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Personnel Management—Freedom and Control

K. R. COOPER, Employment Service Agency, DE

This article by Mr. Kenneth Cooper, Chief Executive of the Employment Service Agency, Department of Employment, is the third and last of a series based on talks given at a forum on accountable management held at Sunningdale. Parts have been up-dated to reflect events which have occurred since the time of the original talk in January 1973.—*Editor.*

Introduction

In the May 1973 edition of this journal, Sir Derek Rayner laid emphasis on the authority of the professional manager.* This is a relatively new idea in the Civil Service. As we seek to develop it I believe managers will be increasingly aware of the freedom that is there to be grasped rather than obsessed with the constraints on or limits to their authority.

We in the Employment Service Agency have now had almost two years' experience of establishing an accountable unit. This has left me with little taste for theorizing too much about the meaning or implications of accountability. I am rather concerned with the practical problems and requirements of particular situations; with the imperatives which follow from the decision to give the employment service—and other similar executive operations—their own specialized management in order to maximize their effectiveness. The proof of a genuine new approach to the whole business of management within the Civil Service will be chiefly seen not in the development of new theories, but rather in ways in which the broad structures and systems can be adapted flexibly to meet the needs of particular units or services.

We have been told that the door is ready to be pushed open by those who can demonstrate the need for changes to be made. We have all heard and read before of the flexibility which is said to exist within the broad Civil Service framework. I am prepared to believe that it is there; there to be won as needs show themselves and as managers within the Service seek with increasing vigour and authority relief from those aspects of central control which frustrate the effective operation of the services for which they have been made responsible.

I have been asked to discuss personnel management, and this is apt since the main resource of the Employment Service Agency is the people that it employs. Without attempting a comprehensive survey I will cover a number of areas, including staff numbers, pay and grading, recruitment, training and communications—some being areas of fairly close central control, but others being areas which are very wide open to the initiative and enterprise of the individual manager.

* *Making Room for Managers in Whitehall* by Sir Derek Rayner.

Numbers

We all have had experience of the dire effects of arbitrary staff ceilings. Both planning and practice are distorted when one resource is subject to materially different restraints than others. Expensive new policies may sometimes be jeopardized through inability to expend small sums on the engagement of staff to carry out particular parts of the work. In other instances departments have been forced into inefficient employment of casual staff without proper regard to the most cost-effective ways of providing services. We shall not expect to escape entirely from constraints of this kind. But I see prospect of more effective resistance to some of these grosser nonsenses as managers develop their authority by getting a closer grip on what is happening in their organization and by developing clearer measures of performance.

We have been taking a number of steps in this direction in the employment service. First we have introduced charges to employers for use of our Professional and Executive Recruitment services. We expect that within two years or so much the greater part of its resources will come from revenue and it will be possible to assess its effectiveness substantially by commercial standards.

The establishment of measures of performance for the general employment service will not be quite so straightforward. But as a first step we have rigorously assessed our priorities with the firm intention of limiting the activities with which we are charged to those which are directly relevant to our operations. Over many years the employment service has been loaded down with a wide range of duties which tend to overlay the prime function of filling and finding jobs. As in many other departments there has been a lack of direct management from the centre—a peculiar hybrid arrangement involving administrators who had no responsibility for controlling resources issuing a concentrated stream of direction and advice to managers in the field, and establishment folk keeping a close watch over every allocation or use of resources, but having no responsibility for outputs. This sort of situation was likely to produce the worst of both worlds—doubtfully effective conservation of resources and objectives inadequately met. The dominant concern was rather with cheapness or a narrow definition of efficiency than with cost-effectiveness—with processes rather than products. For the first time in 1973 the employment service has specific output targets or objectives—the main priorities clearly defined so that they can be more ruthlessly pursued.

We have also set out to develop techniques of shadow pricing whereby we hope to be able to assess how much it is worth to place the various types of people (disabled, long-term unemployed, skilled, unskilled) who are our customers. By attaching shadow values to placings and relating them to the costs of the work concerned, we see prospect of developing productivity indices for different functions within an office, different offices within an area, etc., and so over time gaining a much fuller appreciation of what might or might not be achieved from given

resources and what is the likely effect of trying to achieve too many things from limited resources.

We are still only at the beginning of the road of better performance measurement. Nevertheless some of us had envisaged that it might in time be practicable to move towards a situation where the Employment Service Agency was subject to normal financial control of its annual budgets but not to any separate control of staff numbers—the numbers of staff together with other resources being regarded as just one aspect, albeit a key one, of the Agency's total expenditure. Some move in this direction is likely to be facilitated by the decision to set up a Manpower Services Commission to have oversight of the Employment Service and Training Services Agency. When this change takes place the staff of the Agencies will cease to be civil servants. While staff numbers will still be subject to central review and control it should be possible to reach decisions without prejudice from arbitrary limits on the numbers of civil servants.

Pay and grading

The main object of establishing a departmental agency is to improve the efficiency and effectiveness of the services concerned. It follows that the pay and grading of staff should be tailored to help meet this objective in so far as any peculiar needs of the particular services cannot be adequately met by general service-wide structures. In practice in the Employment Service Agency no serious problems have so far arisen in this area which are not shared by other Departments. For example, we experience desperate difficulty in recruiting clerical staff in London and some other major towns. But so do other Departments and we could not reasonably expect to have licence to recruit such staff on differentially favourable terms.

During 1972 we carried out a major exercise to analyse, appraise and evaluate the organization and structure of jobs in the main area of front-line employment work in local employment offices. In the early stages I more than once had to resist pressures to accept, in advance of the results of the analysis, that any resulting change in the structure of jobs should be made to conform with the grading structure of the Administration Group. It should not have been necessary to insist that the needs of the work and service in question should ultimately be predominant rather than conformity to existing structures, important though they are.

Similarly I have had to negotiate hard to ensure sufficient freedom in advertising and settling the terms of appointments for marketing and other staff recruited from outside the Service. In the event the Agency has so far been able to recruit the specialist staff it needed from the private sector. But the presumption that every such appointment can or should fit exactly with well-established Civil Service conventions still dies hard.

Recruitment

As in the area of pay and grading so in that of recruitment I see need for greater flexibility than in the past to meet the particular needs of specialized agencies or services which do not necessarily fit in precisely with general Civil Service needs. For example, the Employment Service Agency has a considerable forward requirement for experienced people at the executive level, not necessarily with the conventional academic qualifications, to carry out face to face interviews with job-seekers presenting more difficult problems. Much of this requirement we should be able to meet by internal promotions and by tailoring recruitment more specifically to the needs of the Agency within the existing rules. But I foresee that we shall also need to seek variations in the normal rules. We cannot afford to set the standards of our services unnecessarily at risk by depriving ourselves of opportunity to recruit potentially suitable older people we know to be available in the labour market. The onus will be on the Agency to establish its case. But I shall expect to find that necessary flexibility is there for the winning.

Posting and allocation policy within Departments

The establishment of departmental agencies is likely to raise a number of difficult questions on the career development of staff within the Department as a whole. These questions will be arising in an acute form in the Department of Employment since over the next year or so the present unitary Department will be divided into four distinct Agencies with a small central corps of policy and secretariat staff remaining in the Department proper. The expression of preferences by all the staff and their selection and allocation to the various areas of work will be a considerable task. It will be of critical importance to me to get staff I want at key levels of management in the Employment Service Agency, but so will the other Agencies be similarly concerned. This serves to illustrate that departmental agencies will need to be allowed to play a positive role in career management and staff development in co-operation with central Establishment Divisions. A passive role involving consultation about appointments in the event seems unlikely to meet the case very often. How in practice the right relationship is to be achieved is not easily prescribed. But the importance of effective involvement in this area is fundamental. Again in the case of the Employment Service Agency the resolution of these problems is going to be eased by our transfer to the Manpower Services Commission for we shall then need to develop our own comprehensive personnel function though still keeping in very close touch with the Department.

Training

I mention staff training only briefly to underline that it is an important area of personnel management in which managers of accountable units enjoy a considerable amount of freedom. In the Employment Service Agency we have taken a number of important staff training

initiatives designed particularly to develop ways of working which are more strongly customer oriented, results oriented. New programmes have included courses on marketing techniques and computer-based systems for staff of the Professional and Executive Register and marketing, interviewing and performance measurement courses for staff of the general employment service. We have used outside training organizations as well as internal facilities according to need.

Communications

Experience over the last two years has convinced me that a truly effective communication system is essential in an organization like the Employment Service Agency, and that this cannot be achieved by over much reliance on the written word alone. Particularly in a situation where great changes are taking place special efforts need to be made to get the purpose of those changes across: staff cannot be expected to become committed to the organization's objectives unless they understand clearly what those objectives are. As part of the wider efforts to improve communications I have in the last 18 months completed two series of meetings with all area managers and senior regional staffs—about 300 staff in nine regions—this quite apart from regular meetings with Regional Controllers and senior regional managers. More importantly, in designing new management structures for the Employment Service Agency as it is separated from the rest of the Department I have also given high priority to getting down to command units of a size which seems likely to encourage closer working relationships and better communications throughout the organization as well as pushing responsibility down the line. Thus we envisage moving to sub-regional command areas rather than the traditional larger standard regions.

There is much more that could be said about the development of communications and the development of methods or styles of management directed towards securing the commitment of staff to the aims and objectives of the organization. Suffice it for me to say that this is an area of managerial freedom which I find most challenging and which I believe will ultimately be most critical in the development of the work of the Employment Service Agency.

Conclusion

The question is often asked whether there are differences between management and administration. I would merely conclude by saying that over the last two years I have become acutely aware of the measure of personal responsibility the manager carries. Work in a departmental agency has been for me as exciting and exacting a job as any I have experienced. The establishment of accountable units and the appointment of accountable managers offer a new opportunity, a new incentive to overcome those things which impede the maximum effectiveness of many of our public services and to gain a more informed commitment from the highest to the lowest level of Civil Service work.

Flexible Hours Experiments

G. GALEY, Inland Revenue

Mr. Galey is Chief Inspector (Personnel) in charge of the Personnel Section dealing with the clerical staff (over 45,000) in the Chief Inspector's Branch of Inland Revenue. Readers interested in a more general account of the development of flexible hours schemes and a list for further reading should consult *Flexible Working Hours, IPM Information Report* 12 (*New Series*), issued by the Information Department of the Institute of Personnel Management.—*Editor.*

Staggered working hours are already familiar in this country. They allow an employee some freedom in choosing the time at which his working day shall start. The freedom does not go beyond this, however; he is expected to keep to his fixed starting and finishing times. Schemes for flexible working hours are quite different; within the pattern of rules laid down by the employer, the individual employee is free to come and go when he pleases and can vary his hours from day to day. This idea took root in West Germany in the 1960s. By the summer of 1972, some 2,000 employers in Europe had adopted it, and the claims made for its advantages were attracting attention in the UK. It was commonly said that flexible working hours:

(*a*) Improve morale by allowing staff both to make the best use of the transport available and to arrange their days to fit their particular needs and leisure pursuits.
(*b*) Reduce the strain on individuals and so improve their health and efficiency.
(*c*) Reduce absenteeism by lessening the temptation to take odd days sick leave—for example, by removing the fear of trouble over being late for work.
(*d*) Encourage married women to return to work by letting them adjust their hours to the demands of running a home.

With the active encouragement of the CSD, a number of departments are now considering experiments with flexible hours. At the end of June 1973, however, actual experience in the Civil Service was confined to the Chief Inspector of Taxes Branch of the Inland Revenue. Nine local tax offices were allowing flexibility of working hours to their staff (most of them having started the experiment in the autumn of 1972). There were good reasons for this early start. The Branch had long been anxious about staff morale and a high rate of wastage, aggravated by the fact that there is a great demand in the private sector for the skill in taxation matters nurtured by long and expensive training. In 1971 an experiment was set up, to start early in 1972, whereby an attempt was made to test the possibilities of job enrichment

in the basic clerical and executive grades. As this progressed, two things became more and more evident. First, the problem of morale was not caused by jobs which were dull: most of the staff found their work interesting and rewarding: the trouble was that the pressure and the strain were correspondingly high. Second, the constraints imposed by the nature of the work were such that there was very little that could be done to change the climate for the junior staff—the typists, the clerical assistants and the tax officers. It was quite natural then that both the official and the staff side representatives engaged in the experiment should look with interest to flexible hours as a means of producing greater satisfaction for these grades.

There was no attempt at all to impose a blueprint scheme for the 10 district offices which were asked to consider an experiment with flexible hours: on the contrary they were given as much freedom as possible in devising their own schemes. First the Inspecting Officers in whose areas the districts were located were asked whether they were willing to allow such an experiment. Then the local managers were asked to produce their schemes by a process of full consultation, using their office Whitley machinery, and submit them to their Inspecting Officers for approval. There were good reasons for all this. The guidance available, the published results of other people's experience, was of only limited relevance, since the context was so different from that of a highly specialized section of the British Civil Service. We wanted arrangements suitable for the Branch, and there was nothing to suggest that a pre-fabricated scheme based on outside experience would be better than one evolved by close discussion by people directly engaged in its work. Moreover, the Branch has over 700 local offices spread throughout the country and inevitably there are wide local variations in staff patterns and in the problems both of the work and of the environment. Local offices also differ greatly in size: the smallest involved in the experiment had a staff of 13, and the largest one of 186. The pattern of the experiment was deliberately designed to test the extent of the variations which would be likely, and tolerable, if the schemes were to meet local needs.

In the event, nine of the ten districts did decide to experiment and did produce schemes which were acceptable to their Inspecting Officers. Eight reached this stage quite quickly and there was only one where it was necessary for the Inspecting Officer to delay the start until a more acceptable scheme was evolved.

Naturally, by this time the Branch Head Office, the Inland Revenue Staff Federation, and the CSD were consulting together and watching progress with great interest. They did not find it difficult to produce a statement of the constraints within which the experiments *must* operate.

Most of these constraints are obvious enough. Management must so control the scheme that neither general efficiency nor the service to the public are at risk. This means in a tax office (as in many other places where flexible hours are introduced) that there is part of the day

(usually 10 a.m. to 4 p.m.) when all staff are expected to be present unless they have permission to be away or are on sick leave. Moreover, flexible hours will permit an officer to work more or less hours in a working day than the normal conditioned hours, but over a period the full conditioned hours must be worked. Management has therefore to decide both how much excess or deficiency of hours may be carried forward, and for how long. Whilst there is no objection to the carry-forward of excess hours resulting in an occasional day or half-day off, management has to ensure (as with normal leave) that this is sufficiently controlled to prevent loss of efficiency because of periods of under-staffing. It is also necessary that time off should not—at least until the effect in Estacode has been agreed with the National Staff Side—lead to the introduction of a regular 4-day or 4½-day week. Finally, junior staff cannot, in their own interests, be allowed to work entirely unsupervised.

Naturally enough, in view of these requirements and of the basic similarities in the work and organization, the nine local schemes had a great deal in common. The variations were in matters of detail such as the earliest and latest hours allowed, the arrangements for lunch times, the amounts of permissible carry-forward, and the length of the 'accounting period'.

One obvious problem was what system was to be used for recording hours worked and to let management ensure that the new freedom was not being abused. In a very small unit this is not difficult: the district office which has a staff of only 13 has managed quite happily with a minimum of formality and fuss. In all the offices with staff of 30 or more, however, some formal system of records and supervisory checks was accepted as necessary. The experiment has shown that it is possible to run a scheme based on simple records maintained manually by the staff and supervisors. There are, of course, disadvantages to such a system. It takes time, it is productive of simple clerical error, and it encourages the more jaundiced among the staff to keep a suspicious eye on their fellows.

The CSD, however, were very helpful in that they made it possible to equip two of the nine offices (one having 76 staff and the other 186) with Hengstler time recording equipment. This is based on a time recording unit for each employee which can be sited near his desk and is activated by the employee's personal key, which remains in the lock the whole time that he is working. It records the cumulative total of hours worked over a period. The equipment has the great advantage that both operation and supervision are simple and quick, and it is much less fallible than manual systems. Nothing is entirely foolproof; there will always be someone who loses his key, but the chief disadvantage of this system appears to be its high capital cost (well over £10 per head of staff) rather than any difficulty in use.

The results of the experiments so far have been somewhat unexpected. Such is the variety of problems in Revenue offices that one is quite unprepared for unanimity of opinion about any innovation. Indeed the

beginning produced the expected note of dissension, in that whilst nine districts were willing to experiment, the tenth asked to be left out. Since then, however, the degree of unanimity has been startling, and we can say that the management and staffs of the nine districts are well pleased. Both the pleasure and the unanimity probably arise from the freedom that was allowed for the fashioning of local schemes to solve local problems. Be that as it may, one can summarize the conclusions to date without having to make any serious reservations about minority opinions:

(*a*) There is no desire at all, among management or staff, to return to 'normal'.
(*b*) Both management and staff are generally agreed that this single innovation has done more to increase the staff's satisfaction than all the previous experimental changes put together.
(*c*) The staff's pleasure in the scheme has quite overcome any distaste for the recording of hours worked: fears of a revolt against 'time sheets' or 'time clocks' were quite unfounded.
(*d*) There have been no serious management problems: staff generally have responded well to their increased freedom and there have been no attempts to abuse it.
(*e*) A few find that the recording of time is somewhat unforgiving, but just as many are quite pleased that no one has the opportunity now to 'steal' the odd minutes at the beginning and end of working periods.
(*f*) A surprisingly large number of people work much the same hours as before. There are not many who want to work really eccentric hours: on the other hand nearly everyone is glad to be free to change, without fuss, when they need.
(*g*) Married women, in general, like the new flexibility and make much more use of it than the rest of the staff.
(*h*) The experiment has also been a boon for those with temporary personal problems (like having a relative in hospital).

By now my readers might feel suspicious. The picture I have drawn may well seem too good to be true. Management does not usually find that change is an unmixed blessing. The cynical might even suggest that changes which are readily accepted by everyone are probably worthless (since such acceptance implies that nothing fundamental has been altered). So let me turn to the hard questions that can be asked about these experiments and give my own answers, hesitant though they are at this stage of progress.

● *Will the enthusiasm last?* No. There will certainly come a time when flexibility will be regarded as normal rather than as a pleasant change.

● *Will management problems then appear which have remained hidden in the first months?* Yes, indeed. As flexibility comes to be regarded as a right

rather than a concession, the present glow of eager co-operation is bound to fade. Petty inequalities may then become grievances. For example, the need for supervision at all times does mean that there will always be situations in which either the junior staff or their supervisors will lose some of their freedom to vary their hours. There will be larger problems, too. It would be surprising if there were no pressure from the staff side towards acceptance of the 4-day week: the CSD and the National Staff Side will have to consider the political implications of such questions as this.

● *Well then, is there any hard statistical evidence that flexibility helps management? Has, for instance, wastage been reduced?* From the point of view of judging the effect on wastage, the experiments could not have started at a worse time. They have coincided with a general dramatic increase in wastage, caused by general economic pressures and subject to wide local variations. At this stage I could only say ' not proven '.

● *What about sick leave then—has it been reduced?* I can point to no striking change. This proves nothing. The sample available is small, localized, and constantly changing. The experiments have only run for a few months. We need much more experience before we can make any confident assertions.

● *Surely there should have been some measurable effect on efficiency?* Sadly I must acknowledge that I can make no such claim. Despite much earnest endeavour by a variety of experts, no one has devised a measurement system which can isolate and quantify the effect of a single innovation on the efficiency of a tax office. There are two main reasons for this situation. In the first place a tax office is subject to constant change on a variety of fronts. The staff, for example, is never the same for long, and a change of District Inspector or the loss by promotion of two outstanding supervisors can have a dramatic effect. Worse still, the workload itself is always changing. Not only the annual Finance Act but also economic changes, both national and local, cause the work of every year to be different from that of the year before. Secondly, the work does not result in a simple measurable end product. The objective of a tax office is not to produce paper, but to solve a complex set of problems, for many of which the management has a choice of different techniques of solution. If one wants laboratory conditions to test the effect of change on efficiency, one should never choose a tax office.

● *If the experiments do not produce statistical evidence of change and if you admit that they will give rise to problems in the future, do you think you can claim any success or that you are justified in continuing?* Yes. From the point of view of the Branch this was never intended to be a laboratory-type experiment. What we have done is test the effect of flexibility on 700 of our staff. They are virtually unanimous that the change is for the better,

that it makes their life with us more enjoyable, that it removes potential causes of strain. There is no reason at all to think that this is an incorrect assessment. Of course, flexibility is not a panacea. There are good grounds, however, for thinking that it helps our staff without adding a disproportionate burden to management. If the wider experience now being sought by the CSD confirms these first impressions then we shall have made a real advance. It seems very probable that flexibility will help us to keep our staff and will help them to give of their best. Be that as it may, we must face the fact that the Civil Service has to compete in a very hard market to recruit and retain its staff. Anything that improves working conditions for them without being excessively costly must therefore be considered very seriously. Our competitors in the labour market will not be slow to seize an advantage if it is offered. At the present time to stand still in personnel management techniques is to fall behind. I accept Mr. J. E. B. Drake's dictum that 'personnel management aims *exclusively* at getting the work of the organization done efficiently and economically'.* To get the work done, however, you need people and you need their loyalty. Thirty years ago W. V. Bradford, in a lecture on the Principles of Promotion, said something which is as true today as ever it was, and which justifies the CSD's desire to see how far flexible hours can be adapted to the needs of the service, and provides me with my final word at this stage of progress: 'One ought to find great satisfaction in being able to meet the reasonable aspirations of staff as a whole. The Civil Service, however, does not exist primarily to satisfy aspirations; it satisfies them in order to exist.'

**Personnel Management—What Can You Expect?* by J. E. B. Drake. *O & M Bulletin*, Volume 27, Number 4, November 1972.

An Evaluation Study of Job Appraisal Reviews

C. A. FLETCHER, Civil Service Department

Introduction

In recent years most large organizations have introduced schemes that involve each member of staff being interviewed by his or her manager at regular intervals. The purpose of these interviews varies from one organization to another, but they generally represent a systematic attempt by management to help each individual employee develop his potentialities to the full. Such interviews are often called Appraisal Interviews and offer an opportunity for a supervisor to discuss with his staff the work done in the past year, the problems that have arisen and the ways in which performance in the job might be improved in the coming year. They also provide staff with a chance to express their own comments about the job and the way they see it, and to talk about the development of their job experience in the near future. In the Civil Service, the term 'Job Appraisal Review' (JAR) has been preferred to 'Appraisal Interview', chiefly in order to emphasize that the main concern of the interview is job performance and how it can be improved, and that the interview is intended to be a two-way exchange of information.

The JAR scheme started operating in some Government Departments early in 1971, and it was recognized from the outset that the way the interviews were conducted and the results they achieved would need to be monitored carefully. A great deal of literature has been published highlighting the deficiencies and problems of similar appraisal systems in industry, and although the type of JAR scheme that had been devised by CSD attempted as far as possible to avoid these pitfalls, it was none the less necessary to gauge the success both of the training given to interviewers and of the interviews themselves. Too often appraisal interviews are introduced into an organization without any systematic assessment of their progress in the early stages, with the result that by the time any weakness in the way they are working (for example, general failure to act on recommendations arising out of the interview) is noted, the whole appraisal scheme has fallen into disrepute. To avoid this sort of situation, the Behavioural Sciences Research Division of CSD was given the task of carrying out evaluation studies of the JARs done in those departments which offered to co-operate in this respect.

The first of these studies has now been completed. It was done in the Welsh Office, a small department which had been particularly quick

off the mark in implementing JARs. Officers at HEO, EO and CO levels were covered by the scheme at the time the study was mounted, and their appraisers had all attended one-day training courses, which in many cases involved doing practice interviews under the guidance of course tutors and in the presence of colleagues. The method used in the evaluation was to issue a questionnaire to all individuals in the grades appraised. The replies were treated as confidential and were mailed directly back to CSD. Of those sent questionnaires, 84 per cent returned their completed copies. The total response rate was even higher than this as some officers who were sent questionnaires were on extended sick leave, etc. Considering that no follow-up 'reminders' were sent, this is a very good response rate. One factor that certainly helped in this respect was the support given by the departmental Staff Side to the study. Of the 252 officers who replied that they had received a JAR, 47 per cent were COs, 34 per cent were EOs and 19 per cent were HEOs.

Results of the study

The findings of the survey can be presented in terms of the three main areas of information provided by the questionnaire:

(*a*) What was discussed in the interview.
(*b*) The way the interviewers handled the appraisal.
(*c*) The results achieved.

The length of this article precludes detailing all the findings, and only the more important facts that emerged will be mentioned; anyone interested in a more comprehensive account of the study will find one in the CSD Behavioural Sciences Research Division Report No. 12.*

What was discussed

Looking first at what was discussed in the JARs; clearly, the individual's performance in his job should be the main topic, and the large majority of interviewee's said they received some feedback on this. But in only 40 per cent of the interviews was there any mention of the interviewee's performance weaknesses. Bearing in mind the fact that the weaknesses discussed in JARs are those areas of an individual's job performance which are less strong compared to his own overall performance rather than compared to that of other individuals, it is fair to say that a considerably higher percentage of interviews should have contained some reference to aspects of the job where the individual was less effective. The handling of negative performance feedback is always one of the greatest areas of anxiety and difficulty on JAR training courses, and it is no surprise to find that some appraisers are still avoiding the issue. They understandably feel that the interviewee may become hostile and defensive if he thinks he is being criticized in any way.

* *An Evaluation of the Job Appraisal Review Scheme as it Operates in the Welsh Office.* Civil Service Department BSRD Report No. 12, February 1973.

However, it emerged very clearly from the study that not only were those interviews in which discussion of deficiencies in the interviewee's performance took place the most effective in producing positive outcomes (in terms of the number of post-appraisal action recommendations made, the proportion of respondents saying the JAR increased their job satisfaction, and so on) but they were also the appraisals that the interviewees responded to most favourably. Their comments leave no doubt that the majority actually welcome a full, frank discussion of their performance, and that they see this as being the most useful function of a JAR.

Discussion of job performance often results in decisions being taken on what action is needed to improve it. In most of the JARs described by the respondents in this survey some form of post-appraisal action was discussed, and in nearly half the interviews a firm decision on one or more lines of action was arrived at. Most of these referred to action to be taken within the immediate job context by the interviewer or interviewee, the rest being recommendations or requests for action to Personnel Services Division. Preliminary findings from an evaluation study in another department (which sends all appraising officers on a two-day training course) indicate that 90 per cent of the JARs being done there generate specific decisions and recommendations on post-appraisal action. Why this figure should be so much better than (almost double) that of the Welsh Office is not yet clear, but may become more obvious when this second study is completed. More action might have resulted from the Welsh Office JARs had more interviewers discussed training needs with their interviewees—only 21 per cent of the latter said that these were mentioned. Whilst JARs are not meant to encourage training for training's sake, it is reasonable to assume that substantially more than one-fifth of appraisees could profitably have been questioned about training needs, or had training mentioned as one of the possible solutions to job problems.

Another major subject for discussion in JARs was, not surprisingly, promotion prospects. These were brought up in approximately two-thirds of the interviews in each grade. As some of the older officers near retirement are unlikely to have raised the promotion topic, it seems that the majority of appraisees who might be expected to be interested in promotion took the opportunity to raise the subject.

The way the interviewers handled the JARs

Of the interviews given, 41 per cent were by HEOs, 31 per cent by SEOs, 19 per cent by Principals and 9 per cent by Assistant Secretaries. The value of the JARs conducted by these managers depended not just on what they discussed with their subordinates, but on the way they handled that discussion. In training, the 'problem-solving' approach to appraisal had been stressed; this widely used style of appraisal encourages the interviewee to do most of the talking in the JAR, the interviewer concentrating on helping the interviewee to think his own

way through job problems and provide solutions for them. The problem-solving style contrasts with the 'tell and sell' style of the interviewer who tells the interviewee what he thinks of his performance and what he should do to improve it (the interviewee thus having very little say in the matter). A series of rating scales included in the questionnaire sent to appraisees give a fair indication of the good and bad points of the interviewers' technique. The scales are shown in *Table I*; each one deals with some important facet of appraisal technique and contrasts the behaviour characteristic of the authoritarian, 'tell and sell' interviewer (the left-hand statements in every case) in that respect with the behaviour characteristic of the interviewer who adopts a participative, 'problem-solving' approach (the right-hand statements). Since the latter approach was the one put over on the training courses, one can say that the right-hand statements are broadly indicative of good technique. For ease of presentation and interpretation, the responses on each rating scale have been collapsed into just two categories—all of those on the right hand and all of those on the left.

The commonest fault, not surprisingly, was that the majority of interviewers (54 per cent) tended to talk too much. However, the majority of these garrulous interviewers were only narrowly marked down on the wrong side of the dividing line—in other words, they only did slightly more of the talking than the interviewee in most cases. Nevertheless, they still did too much talking; the interviewee should usually do most of the talking in the JAR. Another apparent weakness in interview technique is the degree to which interviewers are 'spoon-feeding' their interviewees—the managers are providing the ideas and solutions for overcoming job problems in too many cases instead of the interviewees being helped to find their own answers to problems (see scale 6). As in the case of the scale 1 result, only a small proportion of the interviewers are failing very markedly on this aspect of technique, but it is central to the problem-solving approach and from the responses made on this scale it is clear that there is room for general improvement. The importance of the interviewees providing the solutions to problems lies in the fact that they are more likely to accept and implement their own ideas than someone else's, especially if the latter are imposed in an authoritarian style. However, the situation here is not quite so bad as a first inspection of results might indicate, for the results on scale 6 should be interpreted in the light of those on scale 9. This ninth scale shows that the large majority of interviewers are *trying* to get the interviewees' ideas and suggestions; so that the question arises as to why they are failing in 45 per cent of cases. When the responses on scale 6 are broken down by the age of the interviewees, it becomes clear that part of the answer lies in the fact that younger interviewees are simply unable to produce feasible solutions to job problems, and since they are relatively young and inexperienced this is only to be expected.

This is part of a wider picture of younger officers participating less actively in JARs than their elders. There was a pervasive trend in the

Table I

Scale	**'Tell and sell' style JAR**	*Percentages*		**'Problem-solving' style JAR**
1	The interviewer did nearly all the talking in the interview	54	46	I did most of the talking in the interview
2	The interviewer seemed wholly concerned with assessing my work performance over the last year	50	50	The interviewer seemed chiefly interested in improving my work performance in the year ahead
3	I took the line of least resistance when criticized	23	77	I discussed the assessments with the interviewer when I did not agree with him
4	The interviewer did not allow me to offer my viewpoint on the way I coped with the job	6	94	The interviewer allowed me to put forward my own views on how I coped with the job
5	The interviewer seemed to have made up his mind about things before the interview started	28	72	I got the impression that the interviewer was willing to change his views on things in the light of what I said
6	Almost all the ideas for getting round job difficulties came from the interviewer	45	55	I provided most of the solutions to the problems we discussed
7	The interviewer made no attempt to understand my feelings about the job	11	89	The interviewer made every attempt to understand the way I felt about the job
8	The interviewer did not appear to be paying attention when I was speaking	6	94	The interviewer listened most attentively whenever I spoke
9	The interviewer did not invite me to put forward any ideas or suggestions about the job	14	86	The interviewer continually pressed me for *my* ideas and suggestions about the job
10	The interviewer did not really make my own thoughts about my job any clearer	38	62	The interviewer helped me clarify my own thoughts and ideas about the work

data of younger officers taking too passive a role in the interview. It is certainly not new to find that younger people, especially those who have only recently left school, are difficult to get talking in an interview. But it is not enough for the interviewer just to give them the opportunity to talk—he must use the right questioning technique to draw them out into participating and talking. It seems likely that this is where some interviewers are failing—they are well intentioned and give ample opportunity for the young officer to express himself, but lack the basic interviewing skill to bring the interviewee to use the chance open to him. Perhaps it is relevant to note that the JAR training course the interviewers attended was a one-day course that of necessity concentrated more on the central problems and difficulties of appraisal rather than on the 'basics' of interview technique (e.g. the wording of questions). In future JAR courses for appraisers who are likely to be dealing with younger staff, this is an area which deserves more attention than it perhaps would normally get. Nonetheless, it is not this deficiency in technique that is solely to blame—the fact remains that many young interviewees do not have the experience to derive full benefit from the problem-solving approach (though if action is imposed on them in a particularly authoritarian fashion, they are liable to react against it).

In those cases where the interviewee was an older officer and where the interviewer still provided most of the suggestions in the JAR, there is still a need for improvement with regard to the technique of helping the interviewee to solve his own problems. It would, however, be unrealistic to expect 100 per cent success in this respect.

On the more positive side, there were a number of aspects of interviewing technique where the appraisers scored particularly well (scales 4 and 7–9). For the most part, they gave the interviewees ample opportunity to express their own views and ideas, listened attentively when they did, and were generally sympathetic in that they attempted to understand the interviewees' feelings about their jobs. They appeared to be genuinely willing to let the JAR become an occasion for two-way communication.

The rating scales of interviewer behaviour had another, more intricate use; taken together (instead of individually as discussed so far) the 10 scales give a fair indication of whether any one interview was conducted in a problem-solving or 'tell and sell' style. This part of the study is too complex to describe fully here, but it was shown by comparing interviews of different styles that:

(*a*) Discussion of the interviewee's performance weaknesses in the JAR did not necessarily preclude the interviewer from adopting a problem-solving orientation in his handling of the interview.
(*b*) When used in conjunction with a discussion of the interviewee's strengths and weaknesses, the problem-solving orientation was the most effective style in achieving the goals of appraisal interviewing.
(*c*) The problem-solving approach to appraisal produced a favourable

attitude towards JAR in a substantially greater proportion of interviewees than did the 'tell and sell' style.

Finally, one other important aspect of the way the interviewers handled the JARs. In 90 per cent of interviews, the interviewer was judged to be entirely frank with the interviewee. In the 10 per cent where he was not, the JARs achieved virtually nothing judged by almost any criteria. As one might expect, frankness was vital to the success of the appraisal. This, perhaps, is one of the reasons why appraisees reacted so favourably to interviews where their weaknesses as well as strengths were talked over—it was a sign of frankness on the part of the interviewer.

The results achieved by JARs

How effective were the JARs in the eyes of the interviewees? Nearly three-quarters of them felt that the JAR had given them a better understanding of the job, their performance of it or how to do it better; the same proportion expressed themselves as being in favour of appraisals (only 3 per cent were actually 'against' JARs). A total of 45 per cent of respondents said that their JARs had led to an improvement in their job performance or an increase in their job satisfaction, or both. And as has already been noted, a fair proportion of the interviews produced firm decisions on post-appraisal action, though this proportion was not as large as might have been hoped. However, this survey was done shortly after the JAR scheme had been introduced in the Welsh Office and it is important to remember that most of the appraisers had only carried out one round of interviews and were thus relatively inexperienced. In trying to detect the deficiencies of interviewers' techniques and of the scheme itself so that they may be remedied, it is easy to fail to appreciate fully what has been achieved already. This can be put into perspective by comparing the results of the Welsh Office survey with those of a study done of the old staff appraisal interview scheme which operated (for the most part with untrained interviewers) on a limited basis in some departments in recent years; the interviews carried out in the Welsh Office were, in the way they were handled and the results they produced, markedly superior on almost every count.

One last point about the objectives achieved by JARs should be made. This study was in effect only a partial evaluation of the appraisal scheme; it did not attempt to assess the value of JARs to the interviewers (which is obviously an extremely important aspect of them) and it did not illustrate directly the value of the information provided by JARs to Personnel Services Division. Further, larger-scale studies currently in progress will attempt to evaluate these facets of appraisal also (an excellent survey already done by Customs and Excise indicated that the vast majority, 91 per cent, of appraising officers are in favour of the interviews).

Some implications for other departments

Assessing the implications of the Welsh Office results for the JAR scheme as a whole is a task complicated by the variation in the way different departments run their appraisal schemes and by the differences in the size and structure of the departments themselves. Another factor which must be taken into account when generalizing from the findings is the relatively short training given to appraising officers in the Welsh Office; departments mounting two- or three-day JAR courses may well find that their appraisal scheme reaches an overall level of effectiveness above that of the Welsh Office (where the appraisals are by no means ineffective).

Bearing in mind these inter-departmental differences, what general advice can be given on the basis of this evaluation study? The anxiety interviewers feel about discussing performance weaknesses in the interview is likely to be a universal phenomenon and hence a widespread deficiency in the conduct of JARs. Training should focus sharply on the handling of this aspect of appraisal. There is also a need for special attention to be paid in training to the basic skills of interviewing in general, particularly when the officers being trained will be appraising young clerical and executive staff.

But perhaps the most valuable advice that can be given to other departments is that they should evaluate their own JAR schemes. Some are in the process of doing this, and one or two others have already completed studies of this sort on their own initiative (a particularly good example being the Customs and Excise survey previously referred to). Departmentally mounted studies are the surest way of taking into account the specific conditions that prevail in each department, and will pinpoint any weaknesses in the way the scheme is operating so that remedial action can be taken in good time, e.g. if staff who are supposed to be receiving JARs are in fact not doing so because of the reluctance of a few managers to fulfill their staff management function properly—something which has often been encountered in industry and the Civil Service—this will be detected in a study of this kind. The monitoring of the initial stages in an appraisal system is important to see that it progresses on the right lines from the outset. Inevitably, however, evaluation is also a longer-term process as the ultimate test of Job Appraisal Reviews is their effectiveness over a period of years.

Streamlining the DOE Pay System

H. G. BARNETT, Department of the Environment

As with any Department born from a merger of two or more former Ministries, the Department of the Environment suffered the birth pangs of having more than one system for a number of common functions. One of the more important of these that affected every officer in the new Department was pay procedures. Each of the former Ministries of Housing, Transport and Public Building and Works had its own computerized pay system in varying degrees of sophistication, each with its own associated support system for advising Pay Branch of any occurrences such as sick leave or overtime which affected an officer's standard entitlement for pay. It was early decided that a composite DOE payroll should be established based on the ex-MPBW system and computer program. To expedite the take-on of the ex-MHLG and MOT payrolls the managers concerned decided that initially the existing MPBW payroll input and output documentation, procedures and support system would have to be used. They realized that the system, known as Pay Certification, and by which all the information required was collected by a central Establishments point for consolidation on pay certificates and transmission to the Pay Branch, would be more liable to transcription errors and production of bottlenecks in an enlarged Department. Because they were immersed in current operational problems of merging the systems, they commissioned the newly formed Management Services O & M Division to undertake a thorough study of the support system to see whether it could be streamlined.

The ex-MPBW system for pay certification provided for all sick certificates, daily absence reports, overtime claims and other reports affecting pay to be channelled to a central point, either an Establishments Section or one with delegated Establishments authority. Here, sick absences were recorded on individual permanent record cards similar to those used throughout the Civil Service. Daily absence and other reports were consolidated weekly or monthly, as appropriate, and the details were transferred to a pay certificate which was a computer produced turn-round document listing all officers and their payroll numbers in convenient pay groups. Only factual matters affecting attendance had to be recorded on the pay certificate; all calculations were made by the computer program. Pay certification itself took the form of a positive certification that all the officers listed on the forms were entitled to pay for full service except where otherwise stated, for

example, sick absences. This then was the system which DOE adopted.

The main differences between this system and those used by the former Ministries of Housing and Local Government and Transport, and other systems investigated, was that although most employed a method which involved channelling information to a central Establishments point, Pay Branch was notified only of any necessary pay changes; a procedure sometimes referred to as 'negative' certification. As the MHLG and MOT computer systems were less sophisticated, pay clerks had to enter the rate of benefit, annual reckonable earnings, earnings related supplements, etc., before the information could be fed into the computer. The pay clerks also received overtime claims direct from officers, but they had to enter the hourly rate and the rate at which the claim was to be paid before computer input. The decision having been taken to use the computer program inherited from ex-MPBW it was essential that any system for reporting sick absences and other occurrences affecting pay should be compatible with this program.

Initially it was thought that a 'negative' system of notifying Pay Branch only of exceptions to the norm would be satisfactory and in line with the best O and M practices. But investigation showed that the ex-MPBW system of 'positive' certification involved very little more work than a 'negative' system and had some very real working advantages. Each month the computer printed out lists of all names and payroll numbers, which served as an input document after the certifying clerk had put a dash against all those for whom there was nothing to report or had marked other changes which had occurred. Moreover, the computer print-out of names and payroll numbers saved the clerk from having to fill these out manually (always with the possibility of transcription error) for those staff who had been absent or working overtime, etc. This point was particularly important to the system finally recommended. A further advantage of the 'positive' certification system is that it ensures that Pay Branch receive the information they need in a standard format and in batches at regular times in the pay cycle rather than getting it less systematically on individual pieces of paper, which could go astray, for each member of staff whose pay entitlement may be affected in some way. With about 40,000 staff on the non-industrial payroll it seemed important that Pay Branch received information in a standard form and it was recommended that the existing practice of 'positive' certification should continue.

Investigations showed that the completion of pay certificates was largely confined to factual recording of absences, overtime worked, etc., and no detailed knowledge of sick leave rules, etc., was required. By and large the computer program took care of, for example, changes in sick pay and overtime rates. In order to ensure that the information recorded on the certificate was as accurate and as up to date as possible it seemed that certification should be done by those officers who were already responsible for checking attendance in their branches, and were making regular returns to the central Establishments Branch.

Normally about 10 per cent only of those names pre-printed on the certificates required an absence or other entry to be made, although in winter or during an epidemic this could go up to 20 per cent or more. Calculation showed that making sick absence returns for 50/100 staff to the central Establishments Branch took up about 8 per cent of an officer's time and most of this was spent in checking on which staff were absent and why. Completion of the absence return itself took only a few minutes. It appeared that the additional completion of the pay certificate would take up very little extra time and should not need any extra staff in the branches concerned. Accordingly a simple form was devised enabling each officer responsible for certificates to keep a daily record of absences, sending a copy weekly to the central Establishments Branch (still necessary for some functions other than pay), completing the pay certificate each week or month with the minimum of difficulty and sending it direct to the Pay Branch.

At this stage ideas were discussed with the central Establishments Branch and the Pay Branch both of whom accepted, in principle, the suggestion of 'local' certification. Accordingly proving trials were undertaken in selected branches. These showed the need for some minor adjustment to the procedures, but no insuperable snags were encountered and, in fact, the proving runs were allowed to remain operational. Indeed, the trials although limited in scope, demonstrated the value of first hand information being passed to the Pay Branch which during the test period resulted in a very high degree of accuracy. More importantly, the trials confirmed that the certifying work for groups of up to 100 staff took up very little time and could be absorbed by existing staff.

The main advantages of local certification can be summed up as:

(*a*) The information is recorded at source and is as accurate and up to date as possible;
(*b*) The drudgery of transcription by the intervening Establishments Branch (and the possibility of consequential errors) is avoided;
(*c*) Direct lines of communication between the Pay Branch and reporting points are established; and last, but not least,
(*d*) There was an estimated saving of up to 40 posts in the central Establishments section.

Against this there had to be borne in mind that a large number of reporting officers would be needed, for whom pay certification would be a small additional task, alien to their normal duties, in contrast to the hitherto specialist staff in the central Establishments Branch. There would also be problems of change-over of reporting officers and subsequent induction and training of their successors, transfers of staff from one reporting point to another, and the distribution and collection of turn-round documents in the Pay Branch to and from reporting points. On this last point it was thought that the Pay Branch might need an additional one or two staff. Nevertheless there was confidence that

very real advantages to be gained by direct local reporting outweighed these risks.

This view was accepted by the clients and it was agreed general implementation should proceed. The size of the task can be gauged by the fact that the Department was housed in over 50 headquarters buildings containing about 200 divisions and it was expected that some 700 reporting points might need to be created and staff trained accordingly to certify the attendance of some 19,000 staff to be brought into the system. The first stage of the task was to establish the reporting points required within each division. This was based upon those officers who had already been making regular absence returns to the central Establishments Branch, but considerable rationalization was necessary. The second stage was the training of the reporting officers. Particular emphasis was laid on this aspect as the success of the operation depended upon the accuracy with which pay certificates were completed and on the goodwill and co-operation of the officers involved. Special teams were set up in the Establishments and Pay Branches to tackle these tasks. Finally there was the change from central to local certification. The whole operation was spread over a period of nine months and has only recently been completed.

The only serious problem encountered so far has been the concern of some staff that local recording meant that the reporting officers (perhaps close colleagues) would have access to personal information. The procedure had to be adapted to ensure that the confidentiality of some personal details (e.g. type of absence or marital status) would be preserved. There was a natural reluctance on the part of some branches to undertake the extra duties involved without extra staff, and a 'hard sell' approach had to be adopted. Staff savings within Establishments are now expected to total 33 officers. Although this does not match the original estimate of 40 (partly because the clerks dealing with the remaining work of the central Establishments Branch are still having to advise the newly trained reporting officers), it does represent a significant and worth-while outcome.

Whilst local certification may have proved correct in theory, its practical application could not have succeeded without the efforts of two groups of people. First, the pay and establishment clerks who were put to a great deal of extra work particularly during the inaugural stages when they suffered a good deal of frustration and irritation. And second, the new reporting officers, on whom the system was primarily dependent, who accepted the additional work for the most part without complaint.

The total staff effort by the DOE Management Services O & M Division in devising the system, organizing proving trials and assisting in general implementation amounted to nearly 300 man days.

O and M Training in the Future

The future training of those engaged in O and M work within the Civil Service has been considered by a Working Party, including trainers and practitioners, which was set up by the Committee of Departmental Management Services Officers (DMS). It reported in June this year and the DMS approved its recommendations. The Civil Service College (STW) is now engaged in the implementation of the suggested changes which it hopes to complete by the end of the 1973–74 academic year.

The report analysed, in terms of age, grade, etc., the staff who are now serving in Management Services (O & M) units. It also examined the O and M task both present and future. It concluded that there was a continuing requirement in every department for what might be termed 'traditional' O and M work. There was also a trend towards more, and wider, organizational studies. There is a tendency for assignment work at this higher level to be undertaken by more senior staff. Until recently most senior staff had been engaged as heads of branches and were unable to devote much of their time to assignment work. Now this is changing. One of the factors on which senior management services staff placed great stress was the need to stimulate managers to review their own effectiveness. They also considered that MS itself should attempt to propagate more successfully its own ability to help management with their day-to-day problems.

The report concludes that to meet the variety of needs a high degree of flexibility is required in the training programme. It suggests that the training of O and M practitioners cannot be exclusively the task of the Civil Service College since much of the operational skill can be derived from working alongside experienced practitioners. For the formal training provided by the College, however, the report recommends that new entrants to Management Services (O & M) should attend an initial course and then be eligible for any of a number of very short courses (termed modules) according to their needs. A module should only be taken when it helps an individual to develop his professional competence or when the demands of the work on which he is likely to engage make it necessary.

The report recognizes two distinct levels of training: basic training for those engaged as practitioners on O and M assignment work, and senior training for those engaged as heads of branches and units or on high-level assignment work. In each case the pattern of a basic course plus optional modules as required is advocated. A key role would be played by the head of the operational unit who will need to determine the training programme for each of his staff.

It is the intention to continue to run continuous series of the basic

O & M Practitioner courses, the training being divided (as now) into two parts with a 3–5 month gap between in which the newcomer undertakes a training assignment in his own department. The supplementary modules will also take place regularly and as frequently as the demand justifies. (It is expected that some will be more in demand than others.) It is hoped that the courses and modules at senior level will be held three or four times a year so that an individual can obtain the training he particularly needs at the earliest possible opportunity.

The Working Party report also recommends that in future the Head of the Civil Service College (STW) should present a report annually to the DMS on the year's activities in O and M training, and use that opportunity to make proposals for any significant changes that have become desirable in the light of experience or market research.

Developing a Research and Information Service for MS

MRS. E. A. PAZERA, Department of Health and Social Security

Introduction

For about eight years DHSS Central Management Services has operated a research and information service for its various MS staff. It has been suggested that an account of how the service has developed since its inception, its organization and the service provided might be of interest to readers generally and, perhaps, useful to other departments and organizations considering a similar service.

History

Early in the development of efficiency studies in the hospital service it was borne in upon the Department and Chief O & M and Work Study Officers (CWSOs) of the Regional Hospital Boards that there was a need for an interchange of information amongst staff engaged on this specialized work, and that it was imperative to develop a means whereby staff could call upon the experience of their colleagues in other regions.

In 1965, therefore, the Department established an information service: it began with the collection and analysis of reports supplied by CWSOs on work carried out in their units, and reports on the studies undertaken by the then NHS Central O & M Unit of the Department. The staff of the section comprised one full-time and one part-time member and in 1966, its first full year of operation, when the foundation of the service was being laid, 50 enquiries were answered from hospital service staff.

From this small beginning the service has grown into a major activity of the central MS unit, and during 1972 over 6,000 enquiries were handled. Each year the regions send over 350 reports on their work, for processing, analysing and absorption into the system, to be used in answering enquiries, and about 50 reports from other sources are similarly processed. Some 10,000 published articles are scanned annually, of which about 2,000 are selected for analysis and incorporation.

The liveliness of the users of the service and the growth of their needs has influenced the way in which the service has expanded, and its search for up-to-date information and opinion involves close liaison with developments in the management services field in many spheres. The Research and Information Section is also in direct and regular communication with over 160 foreign and commonwealth organizations, many of whom use the information facilities offered and supply the service with material about work in their own countries.

Reports

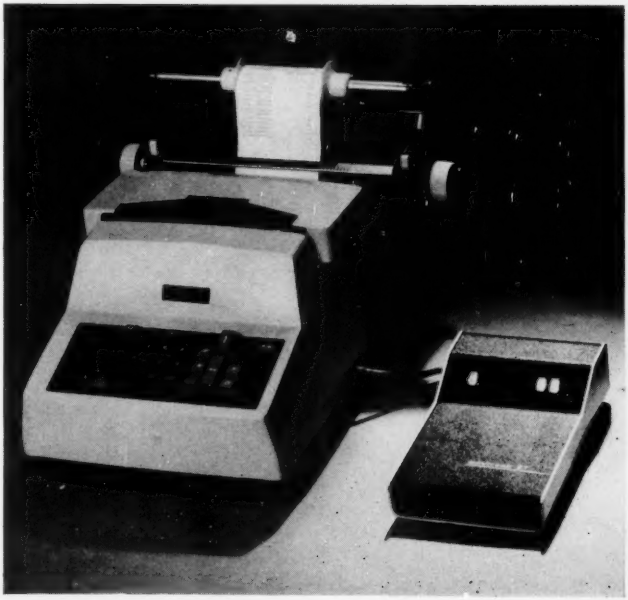
The core of the information store is the reports sent to the section by CWSOs. These are processed and indexed in a feature card system* with reports from the central MS unit, from Wales and Scotland (who requested to join in the scheme when pressure for such a central service would have entailed otherwise the establishment of an information service at the Scottish Home and Health Department and the Welsh Office), reports from other Government Departments, the Armed Forces, and from overseas organizations. Operational Research reports from regions are now, when received, also fed into the system. The titles of reports received over the previous five years are published annually in a *List of Assignments* and distributed to CWSOs for issue to senior members of their staff.

Published material

A scanning service is in operation: a member of the R & I Section scans a very wide range of publications, and extracts and processes those items which would appear to be of interest in the management services field. Internally these articles are referred to staff in the central MS unit whom it is felt might be interested in the particular subject, and the articles are then featured and indexed in the feature card system. Information wallets are maintained covering areas of work, such as out-patient departments, nursing administration, pathological laboratories, etc., into which copies of worth-while articles are fed. The wallets contain a bibliography showing books and articles of a wide interest for those either coming new to a subject or wishing to make a study in depth. This scanning operation has been widened during the past 12 months to include the local health authority and family prac-

* The setting up of the feature card system was described in the *O & M Bulletin*, Volume 22, No. 3, August 1967.

3M Model 235
'VHS' Copier



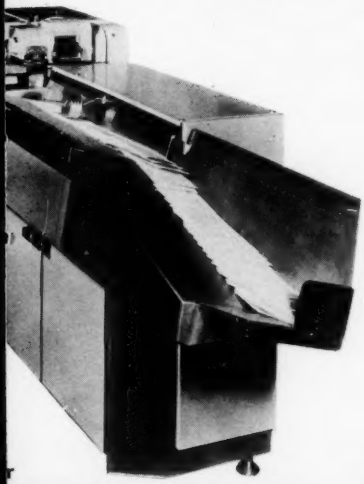
Minitronic 'Black Box' CDV (attached to an OCR add-lister)

Gestetner Model 211SE4 Offset Duplicator linked with a 100-bin automatic sorter

Gestetner Model 210SA3 Offset Duplicator

3M Model 201 Reader/Printe

Pitney-Bowes Model
4380 Postage Meter



Gestetner Model 213
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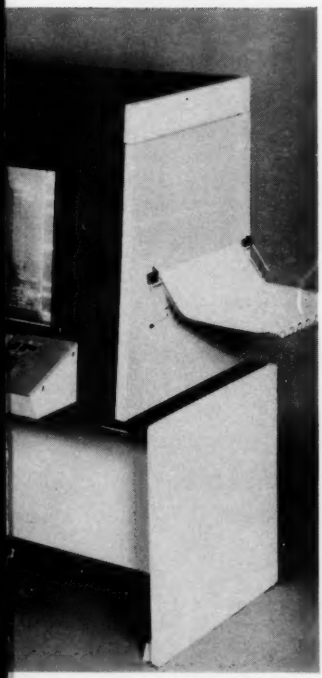
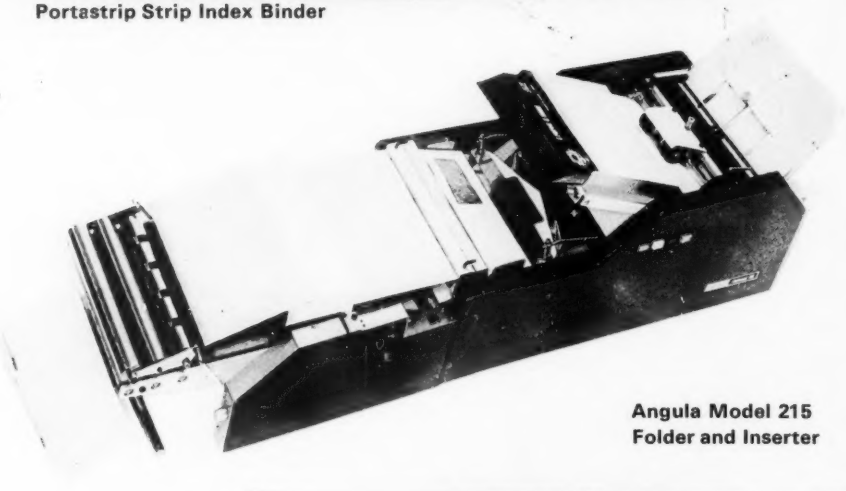
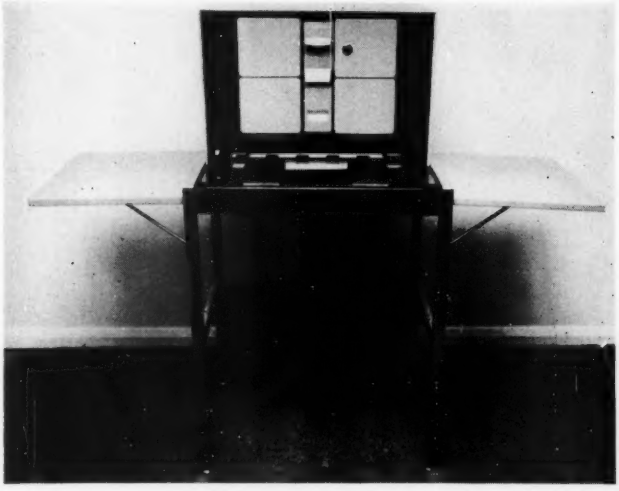
Bell & Howell Microlite Microfiche Reader



Portastrip Strip Index Binder



Angula Model 215
Folder and Inserter



Bell & Howell Intercom
16mm Microfilm Recorder

titioner services, in readiness for the 1974 reorganization of the health service.

'Rise and Shine'

Recently a weekly bulletin *Rise & Shine* has been published listing the material taken into the R & I Section during the previous seven days. A service is offered to staff of the central MS unit who may call for items in the bulletin. *Illustration 1* shows the cover under which the copies are circulated. Items required can be ticked in the column provided on each page (see *illustration 2*); the cover address can then be crossed through and the whole bulletin returned through the messenger service to the section who deal with the requisitions. The bulletin is also sent to regions so that they can benefit from the scanning service, though they obtain copies of articles and publications from their own library sources.

Current use of the service

During 1972 the service answered 6,470 enquiries. These included, for example, requests for staffing ratios, information about work in kitchens, medical records departments, car parking in health centres, the use of radio-controlled vehicles, and equipment for the chronically ill. About 10 per cent of enquiries involve considerable research of available material and a widening of the search to, for example, other Branches of DHSS, other Government Departments, BIM, RIPA, etc. These can take a number of staff up to a full week of enquiry. Some enquiries result in a negative reply and can be pointers to where further work needs to be done. The vast majority of enquiries can be resolved and replies prepared at the cost of 30 minutes or less of central staff time.

Liaison with Leicester Polytechnic

The Leicester Polytechnic is the training centre for NHS O & M and Work Study staff, and a close liaison is maintained with the lecturing staff to ensure that newcomers to the hospital service are made aware of the central resources available. Students are encouraged to use the service as part of their training projects for the Polytechnic; and the staff of the section take great pride in entering into the spirit of this aspect of the work and fostering good relationships with their future customers.

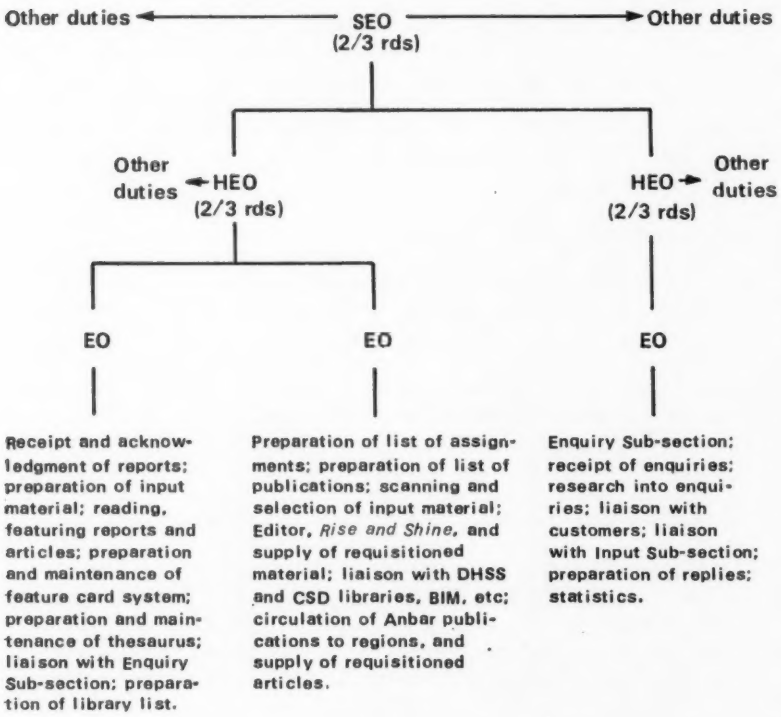
Those served

The section currently serves NHS management services staff numbering well over 800 in England and Wales. In addition, enquiries are handled from the Scottish Home and Health Department on behalf of MS staff serving in the National Health Service in Scotland, from the Northern Ireland Hospitals Authority, Belfast, on behalf of the hospital service MS staff serving in Northern Ireland, as well as overseas and other enquirers: a very happy and lively relationship exists, for example,

with the MS Section of the States of Guernsey Civil Service Board. Taking into account the personnel of the central MS unit itself the section is thus serving over 1,200 known possible enquirers.

Organization of the R & I Section

The task of the section is broadly organized as follows:


Other duties
SEO
(2/3 rds)
Other duties
Other duties
HEO
(2/3 rds)
Other duties
HEO
(2/3 rds)
EO
EO
EO
Receipt and acknowledgment of reports; preparation of input material; reading, featuring reports and articles; preparation and maintenance of feature card system; preparation and maintenance of thesaurus; liaison with Enquiry Sub-section; preparation of library list.
Preparation of list of assignments; preparation of list of publications; scanning and selection of input material; Editor, *Rise and Shine*, and supply of requisitioned material; liaison with DHSS and CSD libraries, BIM, etc; circulation of Anbar publications to regions, and supply of requisitioned articles.
Enquiry Sub-section; receipt of enquiries; research into enquiries; liaison with customers; liaison with Input Sub-section; preparation of replies; statistics.

Among its other functions, the section:

(*a*) Provides the secretariat for the Management Services Officers Committee.

(*b*) Prepares from returns collected from the regions a quarterly statement of O and M and work study practitioners employed in the NHS; a summary of this detailed statement is issued to CWSOs.

(*c*) Maintains an up-to-date technical library of books of merit in the management field and publications on O and M and work study techniques.

(*d*) Provides information on office machinery, in conjunction with the office machines section of CSD Management Services and HMSO.

(*e*) Maintains a search for useful ideas or improvements which have been introduced, and which can be introduced into, or used to stimulate thought on methods of improvement in, other places. These results of studies are then published through HMSO in the form of *Abstracts of Efficiency Studies in the Hospital Service.* Over 160 titles have so far been published in the series.

The customer's needs

In considering the objectives of the R & I Section the nature of the customer's needs has been examined and defined as:

(*a*) *Current, up-to-date information.* It is recognized that a primary need is for the information imparted to be up to date and of current applicability. It is particularly important that answers to enquiries should take into account the policies of the Department.

(*b*) *Comprehensive information.* There is a need for the information to be comprehensive, and for an exhaustive search to be made of a wide range of sources.

(*c*) *Direction to actual sources.* Apart from being provided with information from various sources the customer often benefits from being directed to these sources, for example, a contact at a Regional Hospital Board MS unit.

(*d*) *Speed.* This is often essential if the information required by the customer is to be put to the use intended.

(*e*) *Presentation.* The customer welcomes good presentation of the information. It should be easily assimilable and presented succinctly; the customer is usually too busy to wade through facts irrelevant to his purpose.

(*f*) *Reliability.* The customer needs to be confident that he can rely both on the efficiency of the service in getting the information to him on time and on the accuracy of the data with which he is presented.

(*g*) *Relations.* The customer naturally welcomes a friendly and obliging approach on the part of those operating the service. This both makes his task more congenial and encourages him to resort to the service more frequently.

What is required of the customer?

On the other side of the coin is the question of what the R & I Section need from the customer in order to be able to give him a more efficient service. There are several ways in which the customer can help himself and assist R & I staff to help him:

(*a*) *Input*

Total input of customer's work. The life-blood of the R & I service is the customer's work! To keep the service alive all the work he

produces and all the information he acquires needs to be fed in. Reports received from hospital authorities are treated in confidence and enquirers only informed of the existence of the report or its general findings. The originating organization must be approached direct for a copy.

Information about projected work. In addition to copies of reports already published, the R & I Section welcomes information about studies and other work programmed for the near future. This allows the section to refer interested people for discussions about the projected work and reduces the risk of duplication of studies.

(*b*) *Recall*

Ask precise questions. Rather than make a vague enquiry about a broad field of work, the enquirer should narrow down the search by specifying his particular interest. It also helps R & I staff to know where the enquirer has looked so far so that they can avoid referring him to sources already consulted.

Give the reasons for his enquiry. He should state broadly why he needs the information he is requesting since this will enable R & I staff both to identify the type of material which can be useful to his purpose and to narrow their search.

Clear priority grading. The tendency is for most customers to regard their enquiry as 'urgent', but such an unqualified indication of its priority or an equally vague request like 'as soon as possible' is of no real value in determining priorities. Where there are so many conflicting demands it is necessary to have a more precise idea of the urgency of each enquiry, e.g. 'within five days'. The more time allowed, the more opportunity for a comprehensive answer.

Advance notice. The need for advance notice wherever possible is closely allied to priority grading. The customer can benefit himself by giving advance notice of an enquiry since it allows the R & I Section to programme his request and thereby devote the maximum time to responding to it.

(*c*) *Evaluation*

Feedback. To enable the R & I Section to evaluate their material stock and review their level of service, it is useful for the customer to feed back information on the value of the material supplied, especially remarking perhaps on extremes of 'valuable' and 'rubbish'!

The future

For the immediate future the area of search for material is widening to meet the changing requirements of the reorganized health service. The work on which the section's customers will be engaged after 1974 will extend into new fields, and the staff's own knowledge and experience must be similarly extended.

More and more the emphasis needs to be on the co-ordinating function, and plans are in preparation for the R & I Section to gather and publish information on future work programmes, to notify MS staff of areas of repeated enquiry where little information exists and to publish wherever possible details of studies or parts of studies as either *Abstracts of Efficiency Studies* or information leaflets.

Weeding and up-dating of the information store is, of course, a continuous and automatic process. The hunt for ways of cutting down storage and making information available before it is requested has also high priority: it may be that 'packages of information' on areas of interest can be prepared and published, and the working papers to that date destroyed: microfilming of source material might be the answer, with reader/printers at regional level and a central reference bank only at headquarters. These and other ways of streamlining or improving the service are under constant review.

The feature card system

One last word about the system itself, which has now been in operation for over five years. The value of the retrieval is only equivalent to the excellence of the featuring and accuracy of punching, both of which are skilled and time-consuming tasks. It is *not* a quick and easy method of indexing material. It *is* a quick, easy, sure and detailed form of retrieval of material. Short of 'going computer', if I were now about to choose a system of retrieval I would still opt for the optical coincidence cards, though I would make some changes to my original ideas on the thesaurus, using concepts rather than single words.

Illustrations 1 and 2, which are referred to at page 203, follow at pages 208 and 209.

Illustration 1

Address 1 ----------
Name ----------
Room No. ----------
Bldg ----------
Address 2
Return to
Room No. 212 Ray House

RESEARCH & INFORMATION SERVICES EXTRACTS AND SELECTED HOSPITAL INFORMATION & NOTEWORTHY ENQUIRIES

Issued by ---------- Research and Information Section,
Central Management Services ---------- D.H.S.S.

RESEARCH AND INFORMATION SERVICES
(CENTRAL MANAGEMENT SERVICES)

Illustration 2

Weekly Bulletin for week ending: 16 June, 1973

Item	Description	Requisitions: Tick items required and return as indicated on front cover
	ACCIDENT AND EMERGENCY SERVICE	
B	An area accident service. F.G.St.Clair Strange, FRCS, Consultant in orthopaedic surgery, Canterbury. *Royal Society of Health Journal* No. 1 1973. 6 pages. 2193	
	ARTIFICIAL LIMBS AND APPLIANCES	
A	Responsibility and Grading of the Officer-in-Charge — Artificial Limb and Appliance Centre. Princess Margaret Rose Orthopaedic Hospital. South Eastern RHB, Scotland August, 1969. 3494	
	BLOOD TRANSFUSION CENTRES	
B	Electronic Data Processing as an Aid to Statewide Blood Management. A.J.Katz, R.S.Holdt and E.E.Morse. *Transfusion Philadelphia,* July/August 1972, Volume 12, No. 4. 6 pages. 2191	
	BEDS	
B	Determination of bed allocations within the hospital services. Notes for students. *The Hospital and Health Services Review,* June, 1973. 3 pages. 2185	
B	An interim report on an experimental trial into the use of continental-type quilts in hospital. P.G.Bowen, DPA, Hospital Secretary, St Margaret's Hospital, Epping, Essex. *Hospital and Health Services Purchasing,* May, 1973. 2 pages. 2207	
B	Special Beds. Paul Bates, Sales Executive, Egerton Hospital Equipment, Ltd. *Hospital and Health Services Purchasing.* May, 1973. 1 page. 2205	
B	The Ergonomics of the hospital bed. Pauline Bretten, MSc (Ergonomics), SRN. *Hospital and Health Services Purchasing.* 2 pages. 2206	

Key: A = Reports received from Hospital Authorities
B = Articles taken into wallets
C = Books purchased for the Library
D = Interesting enquiries together with brief note of reply sent
E = Any other relevant information

More O and M Thoughts on Training

C. R. STICKLAND

Mr. Stickland was formerly a lecturer at the Specialized Training Wing of the Civil Service College and is currently seconded to the Institute of Public Administration in Kampala, Uganda. In the article that follows he expresses some personal views.
—*Editor.*

The juxtaposition of Derek Wellman's article in the November 1972 edition of *O & M Bulletin*,[1] with that by Messrs. Hancock and Hodge[2] prompts some further thoughts on training which were perhaps implied in parts of the earlier articles but not made explicit. The word 'training' is here taken to mean a programmed group learning situation of some sort which cannot be met by the normal guiding and training function of the supervisor or manager.

Let us proceed from D. Wellman's assumption that the O and M approach is to ask awkward questions and to challenge traditional assumptions and methods of doing things. It is then necessary to pursue the question 'Why?' through a number of even earlier stages in the process of designing and running a training programme. Specifically it is necessary to consider the relationship of unit and individual performance to their respective objectives. Just what is the training programme supposed to achieve? How do we know we are doing the best things in order to achieve the intended result? Will an established course pattern always prove suitable for its customers?

First there is the need to formulate and state objectives. The objectives of a training course do not exist in isolation. They should derive directly from the customer's operational objectives. The course organizers must understand these in order to design the course. But do the customers? Whatever may be the case in the private sector—and it should certainly not be assumed that it has a monopoly of good managerial practice—the organizations in the public sector who have adopted MbO are the exceptions rather than the rule. Those who have been involved in MbO projects seem to agree that one, but by no means the only reason for a long time-scale in carrying out such projects is the difficulty of arriving at explicit, harmonized statements of objectives which have the total support of all the affected managers. If this is true of those organizations which have recognized that problems exist and have been willing to involve MbO to help solve them, what must we expect to find where the problem has not even

[1] *O and M Thoughts on Training* by D. D. Wellman.
[2] *MbO and Training—An Integrated Approach* by C. J. Hancock and H. C. H. Hodge.

been recognized? For all the easy talk about objectives in management writings down through the years this still seems to be one of the most elusive concepts in terms of practical application.

The absence of clear and integrated objectives does not stop an organization from initiating and supporting training programmes. This makes the questions posed in the second paragraph above particularly relevant. Many examples are to be found of organizations which maintain domestic training facilities with a structured series of courses —a sequence of hoops through which every performing dog is expected to jump. As with the dogs, applause follows the successful completion of the manoeuvre. Training Section can keep up its percentages, or productivity, or however it measures the proportion of eligible candidates who have actually passed through. Buggins has had his turn and now he can come back and get on with some real work.

Neither is training provided solely from within the organization. A good deal of money is spent with outside training establishments. Realization of this cost element seems to make managers a little less ready to call back their subordinates from the course in order to meet a local problem. An alternative explanation is that outside training somehow provides something which cannot be provided from within and therefore it is a more justifiable interruption of daily work. Or it may be that a domestic training unit is just more readily accessible and it is therefore physically easier to recall someone. For whatever reason it is precisely the people who book but do not take up training facilities, or who recall their subordinates prematurely, who increase the cost of these facilities for others. Not only is the total cost of the course shared among fewer users but there is the hidden cost of the foregone opportunity which another user would have taken up, given the offer.* Secondly, we can hardly expect useful behaviour change from someone who has not been allowed to complete the programme. If no useful behaviour change results, then the benefit of having come on the course at all is forfeited quite apart from the effect upon the morale of the individual and his willingness to participate in a similar programme at a later date.

Despite pretensions to enlightenment there is still among managers at various levels a view that training is a tiresome necessity. It is increasingly argued that this view is fast dying. One hopes this is true. It will only die, however, when attention turns away from the need to fight the daily battle against the rising tide of files and paper, and turns instead to longer-term questions of the capability of the unit in human terms to accomplish its objectives. These objectives relate not only to the technological aspects of the organization's work but also to the organic development of its human resources including constructive responses to individual performance and aspirations.

* A discussion of alternative costing systems under Vote accounting procedures, and the arguments for and against their application, is deliberately avoided for the purposes of this article.

It should not be thought from the above comments that a series of standard domestic courses is necessarily wrong. Provided they are geared to real training needs they may be highly beneficial. The danger is that they become stereotyped and an end in themselves. Secondly, because the larger departments must cater for a large clientele they are forced to generalize in the attempt to suit as many people as possible. Thus for each course member there will be a proportion of the material which is not wholly suitable. This is often justified on the basis that 'the education will be good for him'. It may well be, but the comment unfortunately reveals the basis upon which many courses are put together. 'How can these people know what the course should cover? We must give them what they ought to have.' Whatever may be the difficulties of identifying training needs, this daddy-knows-best attitude is dangerous arrogance.

The question of 'What they ought to have' should be concerned with the notion of performance. In theory a training programme can be justified because some behaviour change is required in order to improve performance. But what is 'performance'? If there are clearly defined objectives it should be possible to understand what should be achieved and hence how good performance is. Equally if we are teaching clearly defined skills which are completely new to the participant it is fairly straightforward to set performance standards. A great deal of vocational training, however, is not of this kind. Furthermore, it has been suggested above that clearly stated objectives are often absent. This leaves us with a totally subjective view of what is performance. Worse, it is a one-way concept in which the judge is not accountable (except in extreme circumstances) for the opinions vouchsafed in his confidential reports. The whole approach of the Annual Confidential Report with which civil servants are so familiar has been criticized in many quarters. Attempts have been made to improve it, to standardize it, to supplement it with appraisal interviews. Like antique furniture, however, it survives; highly polished in its verbiage, quaint but elegant in its design but virtually useless for the practical purpose of evaluating real performance. It has its admirers, whom this paragraph will doubtless offend, and it has its defendants who recognize its shortcomings but who cannot see a preferable system.

The argument is here concerned, however, to explore the implications of this situation for the design of training programmes rather than to criticize or redesign annual reporting procedures. The practical effect is that:

(*a*) Where clearly defined objectives are absent, a man's performance is viewed subjectively and hence he is likely to be evaluated differently by different managers, who in turn may give different prescriptions for his training needs.
(*b*) Annual Confidential Reports do not in general help us in trying to identify training needs.

(*c*) The manager's desire for behaviour change in his subordinate is often an attempt to create a 'self-image'—'to get him to do it as I would do it'.

(*d*) The training programme may, therefore, be chasing a chimera. The results which are desired from the training programme and the standards by which its success will be judged are in the minds of each of the client managers. These perceptions are likely to be different from those of the programme organizer.

Some attempts have been made to overcome these problems by conducting client research into the design of a training programme. The idea is to enumerate the objectives of the programme, which will specify the required behaviour change. If the demands of the client managers are vague and subjective this is obviously difficult. The problem is less intense where the programme is designed around the acquisition of specific skills, for example, book-keeping or project network analysis. Where supervisory or managerial training is concerned, however, several related problems emerge. First, there may be client differences in the understanding, interpretation of and agreement with the concepts which will form an important part of the programme. Thus, although there may be an evident behaviour change in the course member, it may not be the sort of change the customer thought he wanted.

A similar difficulty may arise as a result of the organizational climate. Even when behaviour change is desired by managers it may not be possible for ideas which were accepted during the training programme to be applied 'back at the ranch'. Where this is true it may be quite inappropriate to launch a man on a training programme, not only because he will not be able to capitalize on it, but also because it may not be necessary, or worse, would merely invoke frustration symptoms in the trainee. Human behaviour, and hence work performance, is to some extent influenced by the environment. Low performance may, therefore, arise from recognition of the environmental constraints rather than an inability which needs to be corrected by training.

Since the manager's concept of performance is entirely individual, the designer of a course programme may be faced with highly variable and even conflicting demands from different managers. He then has the problem of designing a package which makes sense to the participants, is relevant to their needs and meets the multifarious demands of the client managers. The easy way out is to 'give them what is good for them'. This is perhaps why that attitude has held sway for so long in training circles (and still does to some extent). On the face of it some compromise seems necessary and democratic ideas of suiting the majority come to the fore. *In extremis* it is tempting to argue that one should perhaps start with the managers and send *them* on a course. Let's start with the managers by all means, but it may not be necessary

to send them on a course. If they can be gathered together at the design stage and induced to talk about their expectations from the programme this may cause them to focus on prime and secondary objectives. It may also cause them to view their own demands somewhat differently having had them subjected to the attitudes of others.

The course members too have individual expectations about the course programme and are interested in what it will do for them. These expectations are a compound of factors from the work environment, from previous courses, from a study of the outline programme and the reputation of the training unit. Each will have preferences as to where the major emphasis should lie and what time and methods should be used for particular subjects. The usual approach is to provide a time-table for the course which leaves no room for flexibility in any of these things. An alternative approach used by some organizations is to hold a pre-course session the purpose of which is to complete the detailed programme design. During such a session course members are encouraged to talk about the problems to which they hope the course will address itself. The course organizers are then on hand to suggest what sort of material is available from their armoury to deal with that particular problem. As the group establishes its own priorities with minimal guidance from the course organizers so a programme begins to take shape.

The idea of this approach is an extension of the argument that people learn only when they are motivated to learn. If the course participants have themselves helped to shape the programme they are likely to be fully committed to it. There is less opting-out. The course organizer may provide the basic building blocks from which the course is constructed and he may act as a catalyst in group discussion.

It is sometimes suggested that this is all a waste of time because the trainees either do not in fact entertain any expectations about the course, or if they do, those expectations are so vague that they cannot articulate them. It is further suggested that if they do articulate them, the result will be a mass of conflicting ideas, nightmarish to the course organizer and useless for practical purposes. For reasons of this sort very little attempt seems to have been made in the public sector to involve customers and trainees in the design of courses.

The writer's recent experience in seemingly unpromising circumstances (a highly sensitive political climate with all levels in the public sector 'on edge' and therefore unwilling to take decisions of any sort) is that the democratic approach is *not* a waste of time. Direct contact with the user organizations enabled them to reach a much clearer statement of the nature of their individual problems and of the consequent training needs. Secondly, a remarkable (and unexpected!) degree of unanimity emerged between them in both of these categories. The process began with a series of seminars at quite high level which enabled the users to discuss their problems and to point towards a general solution. This was followed by individual meetings with the

participants to try to refine the general solution towards their particular needs. A three-month programme was then designed which commanded their support. This support was evidenced by a very high rate of student return to the second formal training session towards the end of the three-month period. Only one trainee out of thirteen was withdrawn from the programme, where historically the drop-out rate has been high.

The trainees too were consulted about the programme. The first formal training course was designed by the course director on the basis of the consultations referred to above. The trainees were not consulted at this stage since they were being introduced to new techniques about which they had (as was quickly confirmed during the course) no prior knowledge. Evaluative comment about the course was, however, obtained before the trainees returned to their organizations to carry out individual projects to which they were expected to apply their new skills. After six weeks they returned for the second formal training course. This time they were presented with an outline programme but were given the first afternoon in which to discuss the problems encountered during their projects, the needs they thought should be met during the course and hence, the emphasis of the course programme. They were told they could change anything they liked.

Despite the fact that the educational and social environment has not encouraged group interaction and many of these people feel uncomfortable when asked to participate in group discussions, suggestions were nevertheless made for programme changes. Agreement was reached on the suggested changes and the programme was amended accordingly. The trainees expressed satisfaction at this. At the end of the course their evaluative comment was again sought and on balance it showed greater satisfaction than their assessments at the end of the first course.

One should beware of claiming too much on the basis of this experience. The evidence is not totally conclusive and in some respects never can be. We cannot know, for example, whether the evaluation of the second course would have shown similar improvement even if the trainees had not been given the chance to redesign their own programme. However, the improvement is itself encouraging and tends to support some of the general arguments advanced in the earlier part of this article. It suggests that however much it may run counter to traditional notions of how training courses should be organized, it is worth trying more often to persuade both user organizations and individual participants to become involved in detailed programme design. Course organizers do not necessarily know what is best for the customers. It is even possible that closer involvement may cause the user organizations to clarify their own, often hazy objectives and specify meaningful performance standards which may then underly the training programme. This rather suggests that course organizers have a role in part similar to that of the management adviser in a MbO

project, though as the experience of the seminars mentioned above might suggest it need not be confined to a one-to-one relationship. Indeed where there are several users of the same facility some general concensus of users is necessary to enable course organizers to proceed sensibly. The focus implied by this approach is, of course, quite different from that of the training section which acquires all the latest fashionable training gimmicks and foists them on to an unimpressed audience.

When a course programme proudly proclaims its objectives it should be clear that they are not the trainers' objectives alone. They are effectively the terms of the contract between the trainers, the customers and the participants. They are also the yardstick by which we may attempt to measure how far each of the three interested parties has been successful.

Having made a case for participation in programme design, the outstanding question which remains is 'who participates when?' Was it, for example, an arrogantly didactic approach which omitted consultation with participants at the first stage of the programme mentioned above? Is the learning of new skills a sufficient reason or merely an excuse for non-consultation? In retrospect the writer now regards it as a mistake not to have consulted even though there was no general expectation of consultation among even top management let alone the participants themselves. Some of the evaluative comments made at the end of the first course, could probably have been made at the start and the course would have been the better for it.

An alternative conclusion is that consultation might occur at different levels. For example, a course organizer might be justified in deciding on the programme structure in collaboration with the user organization, leaving the participants to comment *post hoc* on the content and conduct of the course. This has been happening to some extent in practice, but it leaves the course organizer holding the ring, in which position he is often a buffer between the users and the participants. There are undoubted difficulties about designing a programme to suit everyone's needs but as a practical matter it is more difficult to defend something which has already happened than to adapt one's plans to meet the group's own perceived needs. Perhaps the most serious problem is that if management's objectives are not clear, and people do not get detailed feedback on their work performance, then it is difficult for those people to comment constructively on the sort of training they need. Historically the three parties to the training bargain have worked too much in isolation. This article is a plea to bring them all together to work out the details of the bargain. The participative aspects of training are now fairly well accepted in the classroom. It remains to extend this idea back to the conception and design of training programmes.

The Work of the Central Computer Agency

J. T. WHITTAKER, OBE, TD, Central Computer Agency, CSD

In March last year the Lord Privy Seal and Minister in charge of the Civil Service Department announced the setting up of a Central Computer Agency in his Department. Mr. Stephen Spain, an Under Secretary in CSD (on loan from the Department of Trade and Industry), was appointed as the first Director in April 1972 when the Agency came into being. He returned to DTI on 1st May 1973 and was succeeded by Mr. Reay Atkinson who had previously been an Assistant Secretary in the Agency.

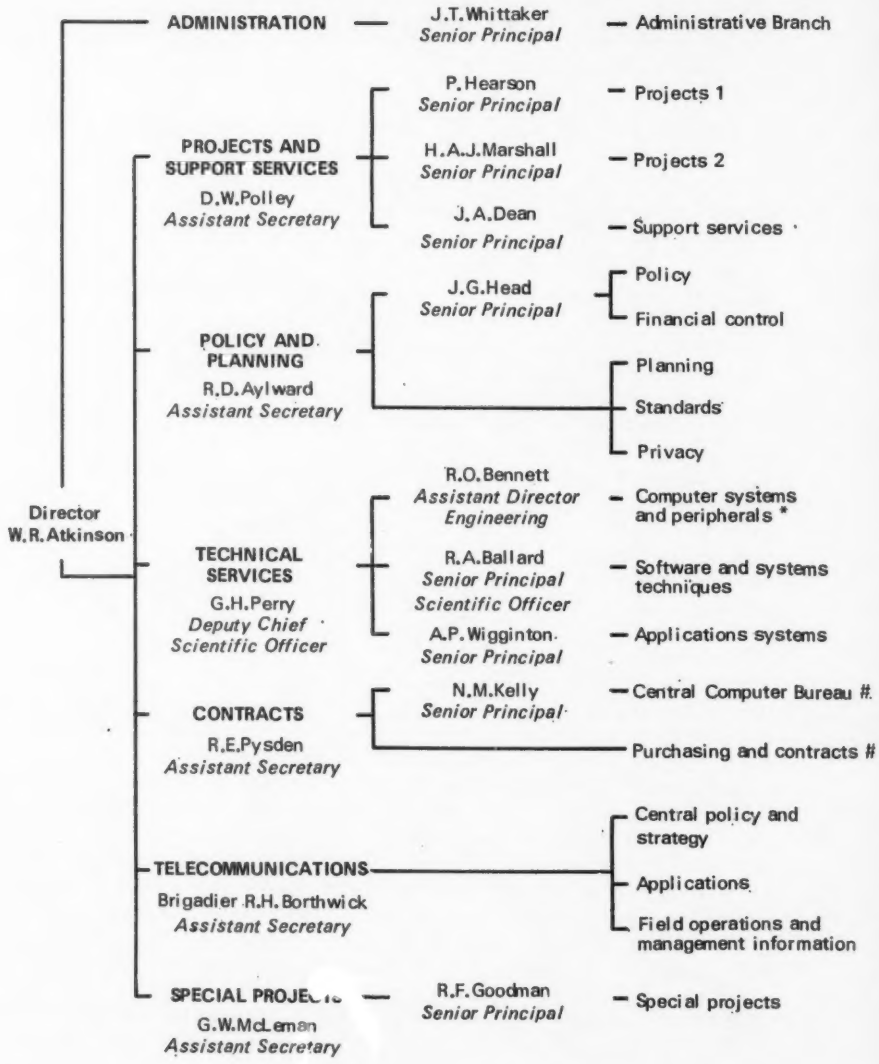
The purpose of creating the new organization was to bring together central functions in Government computing and particularly to associate policy and planning more closely with execution. The work of the Agency is outlined in the succeeding paragraphs. One of its main tasks is to encourage Departments to enhance the skill and expertise of their own staff within economic limits and to further the use of commercial and other external organizations where these can offer economic and effective products and services as an alternative to Civil Service resources. The various aspects of the CCA's work was previously carried out in a number of Ministries including CSD, Her Majesty's Stationery Office and DTI.

Initially four Divisions in the Agency took over the tasks formerly done by the Computer Division of CSD in policy and planning, assistance to departmental projects and systems and software advice, together with technical support previously provided by DTI. Financial approval of ADP projects in Government Departments became a new responsibility delegated from the Treasury and contractual policy and purchasing of ADP equipment and consumables were taken over from HMSO with personnel concerned. The Agency also assumed responsibility for the Central Computer Bureau at Norwich with its staff of 300. To integrate the various functions with as little disturbance as possible, existing blocks of staff were transferred to the Agency whilst retaining their locations in London and Norwich. By creating this central organization of engineers, scientists and administrative officers, greater efficiency of operation and economy of staff has been made possible and career opportunities widened. Overall, Government is now better able to speak with one voice on questions which are of concern to it as a very large user of computers and computing services.

A more recent move has been the setting up of two new Divisions, one for Telecommunications to promote the development of all forms

Central Computer Agency

Organization Chart



* At present located at Old Street

\# Located at Norwich

of administrative telecommunication systems for Government. It deals with all types of line communication from telephones to data transmission for computers and is bringing together a number of functions spread between different Government Departments. The second Division deals with selected departmental computer projects.

A Computer Agency Council has been set up under the Chairmanship of Mr. Kenneth Baker, MP, Parliamentary Secretary to the Civil Service Department, to advise on the development of ADP in Government in the light of experience of big users elsewhere. Members come from large users in commerce and industry, local authorities, nationalized industries as well as from Government Departments. Thus, the policy of consultation on ADP matters between the Civil Service and the public and private sectors is being fulfilled as a useful cross-fertilization of ideas and activities.

The fields in which the Agency operates in order to carry out its work are shown on the organization chart opposite, together with officers heading divisions and groups.

Advice is given to Departments and information on many aspects of computing and computer management both in response to specific requests and as a continuing task in promoting the best use of computers.

The Agency sets standards for computing in Government and for projects and installation management. It promotes, in co-operation with Departments and with assistance of consultants, post implementation reviews to discover whether systems have achieved objectives effectively and efficiently and to initiate any consequent action required to correct failures. Post implementation reviews are a tool of management and the Agency's objective is to subject all projects to this technique and there is valuable feedback of information for general applications.

Another responsibility is that of giving advice on policy questions arising from the Government as a major computer user in the United Kingdom and this gives rise to the need to determine, in consultation with Departments, what policies are to be followed as regards purchase of hardware and software, for example. The Agency also explores with Departments possible developments of computer use so as to improve efficiency.

Departmental projects are scrutinized to see that the proposed application is technically feasible, conforms with agreed policy and will not impair the quality of service to be provided. Cost justification on a discounted cash flow basis is used, the criterion being a positive present value when costs and savings are discounted at a test rate of 10 per cent, but unquantifiable factors frequently have to be taken into account. Proposed projects are carefully studied to ensure that computer capacity required is met by the best means. This is achieved by knowing where spare computer power exists, by providing bureau facilities within Government and by using commercial bureaux where justified.

Advice in the field of advanced techniques covers exploration in

consultation with users on a wide spectrum of technical matters aimed at improving the efficiency and effectiveness of Government computer projects and installations. A comprehensive programme of study and development is carried out in fields considered most beneficial to computing in Government.

Technical services provided include equipment appraisal and supervision of testing machine configurations at the time of acceptance and advice on computer environment, power supplies and maintenance.

The Agency also, together with DTI, represents Government as computer users in relation to industry and to national and international bodies with special attention to the consequences of our joining EEC.

On the management side the Agency assists other Divisions of CSD on ADP matters relating to personnel management, levels of staffing, pay and manpower estimates. Close liaison is also maintained with the Department of the Environment in connection with special building requirements for computer installations.

The cost of computers used for administrative purposes by central Government is borne on the Agency's own Vote. Its procurement functions also cover computers required for scientific and research purposes as well as the requirements of the universities, research councils and the National Health Service.

ADP education and training is a subject in which the Agency is particularly active being responsible for central Government policy in this field. It works in liaison with the Specialized Training Wing of the Civil Service College which promotes training courses in ADP and has close links with the British Computer Society, National Computing Centre, local authorities and others interested in this sphere and has recently recognized the standards set by the BCS examinations as acceptable to Government. The Agency is also particularly interested in the provision of suitable training in ADP for top management and at the other end of the scale in providing opportunities for junior civil servants to attend universities in order to obtain degrees in computer science.

In due course the whole organization will be located in Riverwalk House in London and a special building at Norwich with good communication facilities established in between. This involves the movement of part of the Technical Services Division staff from Old Street to Millbank which we intend to achieve by the end of this year.

New Office Equipment

This section contains a description of new items of office machinery and equipment. Inclusion of any particular item is not to be regarded as an official recommendation nor as indicating that it will necessarily be available to Government Departments.

PORTASTRIP STRIP INDEX BINDER

Marketed by Roneo Vickers Limited,
Roneo House, Lansdowne Road, Croydon CR9 2HA

The Portastrip binder, which is illustrated opposite page 203, is a leather-cloth covered three-ring binder capable of holding six one-piece moulded panels made of white polypropylene.

Panels are designed to carry strips of 8 in. width, but may also be divided by means of a plastic centre strip to give two rows of half-width strips or a single row of 6 in. strips. A clear plastic label holder clips on to the edge of the panel and can be adjusted to any required position to give identification. By using strip heights of $\frac{1}{6}$ in. and $\frac{1}{4}$ in. for one-line reference and $\frac{1}{3}$ in. for two-line references the capacity of the binder is 840, 540 and 420 strips respectively. Transparent dust shields may be used to keep the strips clean.

Binders can constitute the permanent housing of complete indexes or be used for panels temporarily removed from larger stands.

Further information and details of price may be obtained from the company.

GESTETNER OFFSET DUPLICATORS

Marketed by Gestetner Duplicators Limited,
Gestetner House, 210 Euston Road, London NW1 2DA

Gestetner have recently introduced three new offset duplicators to their range of equipment.

Model 210SA3 Offset Duplicator. The 210SA3 is a friction fed machine complete with its own desk-top storage cabinet. Capable of accepting punched and unpunched plates of standard 15 in. × 10 in. size, it can print up to a maximum 7,200 i.p.h. The 210SA3, fitted with an applicator for plate priming, blanket cleaning attachment and automatic plate ejector, is especially suited to short run and systems work. There is a push-button control panel and a combined single lever damping and inking control. As yet no list price has been provided for this model.

Model 211SE4 Offset Duplicator. The 211SE4 is a floor standing

suction fed machine, capable of accepting a wide range of paper masters and metal plates of the standard 15 in. × 10 in. size. It has a variable speed control from 3,200 to 7,200 i.p.h. together with a two sheet eliminator and register side lays.

With its fully automated printing cycle and plate ejection the 211SE4 is particularly suitable for high capacity systems work requiring minimum operator intervention. Optional equipment includes extra inking units and ink roller cleaning attachment. An anti set off spray is also available. *List price* £3,315

Model 213 Offset Duplicator. The 213 is a floor standing machine capable of feeding A3-size paper and giving a maximum image area of 16 in. × 12½ in. It has a variable speed range from 3,200 to 6,200 i.p.h., two sheet eliminator and gripper controlled delivery. Optional extras include plate priming and blanket cleaning attachments as well as chain delivery.

All controls are positioned on the operator's side of the machine and a single lever controls the damping and inking. An interchangeable inking unit simplifies colour changing. *List price* £3,265

Further information about the three models, which are illustrated at the centre pages (the 211SE4 linked with a 100-bin automatic sorter), may be obtained from the company.

PITNEY-BOWES MODELS 4380 and 4351 POSTAGE METERS

Marketed by Pitney-Bowes Limited,
The Pinnacles, Harlow, Essex CM19 5BD

The Pitney-Bowes Model 4380, an illustration of which appears at the centre pages, and the Model 4351 Postage Meters are said to be capable of speeds of up to 12,000 items per hour. They have automatic feeding and stacking and can handle envelopes up to 15¼ in. long × 13½ in. wide and ½ in. thick with the ability to adjust quickly to accommodate the difference in sizes. For extra thick envelopes and packages they will also print postage on gummed tape. Both models seal flaps up to 3⅞ in. deep.

Model 4380 has a large feeding and visual stacking capacity allowing the machine to run without interruption for loading or emptying. It is also equipped with an 8½ cu. ft. storage cabinet for miscellaneous mail and supplies. The smaller Model 4351 is a desk-top unit being 38 in. long including feed plate plus power stacker optional lengths, 20¾ in. deep and 18 in. high. Both models will stamp, date, seal, count, record postage expenditure and print slogans. Each has a detachable meter which will print any value of postage from ½p to 100p.

Further information and details of price may be obtained from the company.

MICROLITE MICROFICHE READER

Marketed by Bell & Howell Limited,
York Street, Twickenham, Middlesex

This reader is the smallest addition to the range of machines marketed by Bell & Howell, and incorporates the same sturdy all-metal construction and smooth carrier mechanism associated with its larger 'brothers'.

High screen luminence and 'constant focus' floating lens combine to project sharp, high contrast images. Its 5½ in. × 8½ in. screen—the larger dimension being the width—makes it particularly suitable for COM formatted fiche. Use with standard fiche and jacket formats necessitates a degree of vertical scan to read a full frame. Frame location is by carrier pointer linked to an X–Y co-ordinate grid.

Dimensions of the reader, which is illustrated at the centre pages, are: height 13 in.; width 9½ in.; and depth 13¼ in. Lens magnifications are: 18, 24, 32, 40 and 48 ×. *List price* £59

PITNEY-BOWES MODEL 252 COPIER

Marketed by Pitney-Bowes Limited,
The Pinnacles, Harlow, Essex CM19 5BD

The 252 is a desk-top electrostatic copier suitable for the low volume user. It will accept originals up to 8½ in. × 14 in. and will produce copies at a rate of 15 per minute. Maximum size of copies is foolscap 8¼ in. × 13 in. down to a minimum of A5. The machine will hold a maximum of 200 sheets of copy paper which is also available in A4 and quarto sizes. Approximate cost per copy (A4) is 1·6p.

Dimensions of the 252 are: length 24 in.; width 15½ in.; and height 13 in. Weight is 60 lb. *List price* £148

MISI-201 MICROFICHE READER/PRINTER

Marketed by Scottish Instruments Limited,
Merit House, Edgware Road, Colindale, London NW9

This equipment is designed for use with microfiche, jackets and aperture cards up to 5 in. × 8 in. Screen size is 12 in. × 12 in. with 18 × and 24 × lenses as standard. Options are 32 ×, 42 × and 48 ×. Interchangeable index grids are available to suit all microfiche formats, to aid frame location.

Print process is electrostatic. The unit delivers an A4-size print in about 10 seconds at a cost of approximately 2p. Paper is loaded in roll cassette, the capacity being about 500 A4 prints. Copy paper is held flat and in position by vacuum during the exposure cycle which assists in maintaining uniform quality across the print. Prints can be positive to positive or negative to positive.

Dimensions of the 201 are: height 27 in.; width 18 in.; and depth 26 in. Weight is 120 lb.

3M MODEL 201 READER/PRINTER

Marketed by 3M (United Kingdom) Limited,
3M House, Wigmore Street, London W1A 1ET

The 201, which is illustrated at the centre pages, has been designed principally for engineering drawing applications—handling 35 mm film in aperture card, jacket, fiche or roll film form. Screen size is 18 in. × 24 in. with a lens of 14·5 magnification. Print-out is by the 3M dry-silver method—full size being 18 in. × 26 in. A screen masking control can be operated to produce a half size (18 in. × 13 in.) print should only a section of the full drawing be required. Type 732 paper is available to produce translucent prints for amendment and possible re-filming.

Dimensions of the 201 are: width 43 in.; height 35½ in.; and depth 36½ in. Weight is 370 lb. *List price* £1,975

INTERCOM 16 mm MICROFILM RECORDER

Marketed by Bell & Howell Limited,
26 York Street, Twickenham, Middlesex

This 16 mm microfilm rotary camera automatically records continuous computer stationery in cine mode up to 15 5/16 in. wide. It will also handle hand-fed single documents from 6 in. to 15 5/16 in. wide, allowing for the filming of large legal and accounting type documents. The recording speed is 70 ft. per minute at a reduction ratio of 26 : 1. Film supply and take-up compartments are protected by separate light-proof doors.

Controls include film footage indicator, exposure control for documents of different colours or contrasts, automatic film 'wind-on', item counter, and odometer for film indexing. Warning signals, both visible and audible, indicate lamp failure or camera fault. In the event of any warning signal being given the feed mechanism automatically stops—thus avoiding the filming of faulty images.

The Intercom design embodies a work station for seated operation.

Dimensions of the Intercom, which is illustrated opposite page 203, are: width 24 in.; depth 24 in.; and height 46 in. Weight is 150 lb.

List price £895

MAGNEDEX MICROFICHE STORAGE TRAY

Marketed by National Cash Register Company,
206–216 Marylebone Road, London NW1 6LY

The tray, which is of aluminium construction, measures 6 in. × 7 in. and has a capacity of 250 fiche or jackets.

The sides of each tray have built-in permanent magnets. Individual fiche separators and section dividers have a punched tab at their base and are held in position by a metal rod which is passed through the length of the tray. The separators have thin metal strips laminated

between layers of card. As the divider is pulled back, the side magnets attract the metal in the separators and cause them to fan out, facilitating easier retrieval and replacement of records. Units can be easily bolted together to provide convenient storage modules for an infinite number of records. *List price* £25 per unit (approximately)

MINITRONIC CHECK-DIGIT VERIFIERS AND GENERATORS

Marketed by Anglo-American Business Machines Limited,
16 Berners Street, London W1P 3DD

A new concept in check-digit verifiers is introduced with the invention of the Minitronic 'Black Box' CDV which can carry out not only full-scale Modulus 11 or 97 check-digit verification, but can also add these same verification capabilities to ordinary add-listing machines thus converting them into reliable data entry units at low cost.

The illustration opposite page 202 shows the Minitronic 97 Black Box attached to an OCR add-lister and operated by its keyboard, without interfering with the normal mechanical operation of the machine except when an error has been made in the keying-in of account numbers. The 12-digit numbers are verified using Modulus 97 and if any digit has been wrongly entered, error lights flash on the Black Box and printing on the add-lister is blocked.

Other features include the pre-setting of the first three digits of any 12-digit entry to remain as 'constant' until another 12-digit entry is made, and the obviation of the need to enter zeros which precede the first significant digit following the constant.

The Minitronic 'Black Box' CDV, a new British invention, is a small low-cost electronic device which can be interconnected to, and operated by, the keyboard of almost any electro-mechanical or electronic machine, including add-listers, calculators, teletypes, encoders, etc. The same Black Box can be 'plugged in' to different machines. The interconnection normally consists of a printed circuit board and a multi-layer 'sandwich' of insulating and conductive material which is operated by the depression of the specific keys which form the number being verified. The device can be connected in an hour or less.

The Minitronic range also includes portable, freestanding check-digit verifiers and/or generators, complete with their own keyboards, and can also include security scramblers among the special features.

3M MODEL 235 'VHS' COPIER

Marketed by 3M (United Kingdom) Limited,
3M House, Wigmore Street, London W1A 1ET

The 235 VHS (versatile high-speed) plain paper copier uses the 3M magne-dynamic process—xenon flash, intermediate metal foil roll, powder, and fusing to plain paper—and has a flat bed copy platen of

8½ in. × 14 in. It is lens operated and designed to handle a varied range of originals including books, blue line, half-tones, photographs and three dimensional objects.

The first copy is delivered in 3½ seconds and subsequent copies every 3 seconds; 99 copies of any original can be selected at a single setting. The program can be interrupted and reset by simple push-button control.

A time saving feature of the copying process is the ability to load a new original prior to the end of a previous run. The intermediate tape has image retention properties and will produce up to 10 copies from one exposure of the original to the xenon flash.

The 235 will accept two paper sizes—8 in. × 13 in. and A4—with a capacity of 1,000 sheets per loading. Imaging powder is supplied in cartridges each sufficient for 5,000–7,000 copies. The intermediate roll, again in cartridge form, is composed of 920 frames. Capacity varies according to proportion of single to multiple copying, e.g. from 920 'one-off' copies to 9,200 'ten-off'. With a 72-hour time lapse between use each intermediate can be used three times.

The 235, which is illustrated opposite page 202, is available on rental terms only. Approximate cost per copy (20,000 copies per month, two-year contract) is 1·3p.

ANGULA FOLDING, AND FOLDING/INSERTING MACHINES

Marketed by Angula Engineering Company,
Windmill Road, Sunbury-on-Thames, Middlesex

The Angula range of machines starts with the Automat 22 which is a simple folding machine for widths up to 22 cm. The range includes A2 and A3 models which can be fitted with scoring, creasing and perforating accessories. The KB35 is a new unit which will fold and cross-fold in the one operation.

The Angula 215, which is illustrated opposite page 203, is a compact machine which will fold and insert into standard size envelopes at a speed, it is claimed, of one per second. When fitted with a sealing unit the machine is then designated the 215S. Mis-feed detectors and additional feed stations for non-standard jobs are also available.

Further details of models and prices may be obtained from the company.

ELECTRIC CALCULATORS

Marketed by Angula Engineering Company,
Windmill Road, Sunbury-on-Thames, Middlesex

A range of machines are available from the above company (who are members of the ADM group), and these cover battery portable, mains and print-out. The following is a brief description of the makes:

Melcor. An 8-digit display calculator operating off dry-cell battery or mains, with memory and percentage key. *Summit.* A range of battery/mains calculators from a basic four-function calculator with constant, 8- to 10-digit display to a four-function calculator with memory, percentage, square root, × squared and reciprocal keys. *Lago.* Display mains calculator with 12 and 16 digits, also a 12-digit one-store. *Angula.* A basic four-function 8-digit display with constant key, a 12-digit display with one-store and exchange key. *Totalia.* Print-out calculators—14-digit one-store, and 16-digit with two-store and square root. Both models have an extra data memory and percentage key.

Further details about the machines and prices may be obtained from the company.

Letter to the Editor

Take a glass of wine with me . . .

Dear Sir,

I am intrigued to know why so many organizations which run short courses or seminars on management services topics inevitably include in their programme 'lunch—with wine'.

Do the organizing bodies really need to flavour their offering in this way? They do not offer 'lunch—with soup and pudding'. Do they think the attraction of a glass and a half of wine will attract one to their function, or are they simply promising encouragement for the post-prandial nap?

There is a saying that a good wine needs no bush. Surely good courses need no wine—at least, not on the programme.

Yours faithfully,

F. R. Payne
Her Majesty's Stationery Office

Computer Installations for Government Departments

A list of all Government computers as at 1st January 1973 was published as a supplement to the May 1973 edition of MANAGEMENT SERVICES IN GOVERNMENT. Details of computers ordered during the period April to June 1973 are shown in the following table.

DATE OF ORDER	DEPARTMENT[1]	LOCATION	MAIN USES	MANUFACTURER[2] AND TYPE OF COMPUTER
1B Computers on order for administrative and general purposes				
April 1973	DOE	Swansea	Vehicle registration and licensing—driver licensing	ICL 4/72
June 1973	DNS	Lytham St. Annes	Bond and Stock Office	ICL 4/72
June 1973	MOD (Central)	Bath	Accounts	ICL 1905T
2B Computers on order for scientific and technical purposes				
April 1973	MOD (Army)	Blandford	Signals training	HP 3000A
April 1973	British Museum	London	Scientific calculations	HP 2100A
May 1973	MOD (PE)	Malvern	Digital data collection	DEC PDP 15/20
May 1973	DTI	Cambridge	Computer-aided design	DEC PDP 11/20
*May 1973	MOD (Army)	Chertsey	Vehicle research	ICL 1903T
June 1973	MOD (PE)	Farnborough	General scientific	ICL 1906S
June 1973	MOD (PE)	Fort Halstead	Scientific application	ICL 1906A
June 1973	MOD (PE)	Farnborough	Research	DEC PDP 11/45

* Revision of the February 1973 order for a 1903A

[1] Department Key (*Column* 2)

DNS	Department for National Savings
DOE	Department of the Environment
DTI	Department of Trade and Industry
MOD (Army), (Central), (PE)	Ministry of Defence (Army), (Central), (Procurement Executive)

[2] Manufacturer Key (*Column* 5)

DEC	Digital Equipment Corporation (UK) Limited
HP	Hewlett Packard Limited
ICL	International Computers Limited

Management Services in Government

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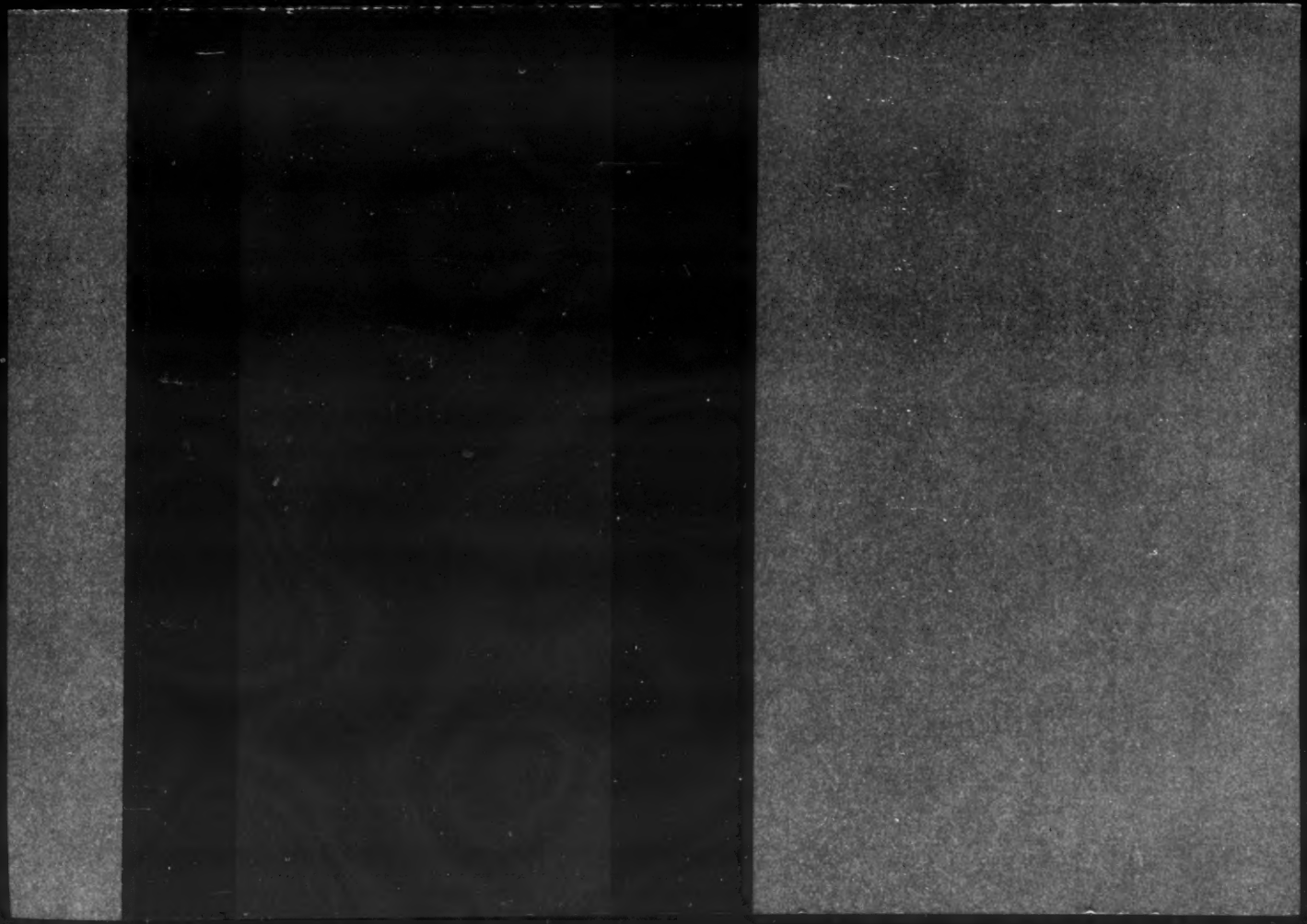
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